Papyrus Library Administration System

Version 4.0.1

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Parity Software

Microsoft GOLD CERTIFIED Partner

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Chapter1

Introduction

Welcome to Papyrus Library Administration System

Papyrus is a comprehensive Library system that provides a range of features suitable for simple school libraries to complex public libraries. Using the latest design tools from the Microsoft development environment, the features of Papyrus include flexibility, an excellent user-friendly interface, complete set of comprehensive reports, easy report writing, and sophisticated searching.

The package consists of three sections namely: the BackOffice System; Front Office System and OPAC.

BackOffice System

The BackOffice System provides the library staff with all that is required to administer the library system i.e. stock, members, trading days, MARC codes, etc.

Front Office System

The Front Office System deals with the issuing and returning of stock, fast and efficient searching for members, handling due dates and fines as well as the ability to issue receipts for moneys received.

OPAC Cataloguing

Designed for ease of use, this system allows the member of the library access to cataloguing information in Papyrus.

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Parity Software is proud of Papyrus Library System and is constantly striving to remain responsive to your needs. We would appreciate any comment you may have concerning this product.

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Email Address : support@papyrus.co.za

Website : www.papyrus.co.za

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Minimum System Requirements

Although Papyrus uses the latest in computer technology, current industry standard equipment is required. A list of minimum requirements is given below and any system with more advanced equipment will have improved performance.

Workstations

Microsoft Windows XP

Intel Pentium , 1024MB Memory

100 MB of free hard disk space

Optional Items

Barcode Scanner

WIA compatible Video Camera

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Chapter 2

Installation

How to Install Papyrus

The Installation program copies the Papyrus Library Administration software to your hard disk and adds a Papyrus program group to the Windows Program Manager or Windows Start menu.

By default, the programs will be installed in the C:\Program Files\Papyrus directory. Should you wish to install the files on a network drive, please contact your network administrator or the FAQ on the web site.

Warning: We highly recommend that you close all applications that are running before you start the installation program.

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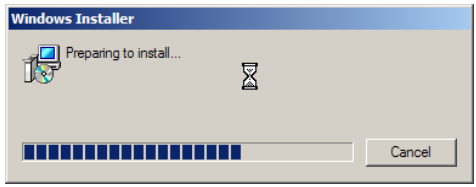
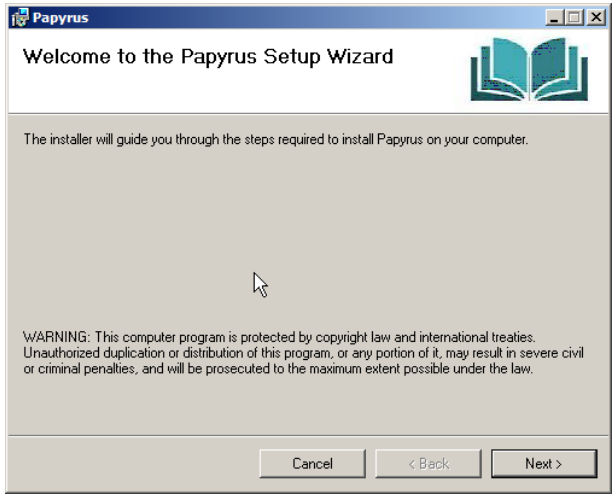
Install the Program Files

Follow these steps to install the Papyrus Program files onto your computer. Download the Papyrus4.MSI file from the website or insert the Papyrus CD into your disk drive. The following welcome screen will appear.



Make sure you have closed all applications before continuing. To install Papyrus in the drive, directory and Windows program group shown in the window, click on the INSTALL button and follow the instructions on the screen.


Papyrus
Welcome to the Papyrus Setup Wizard
The installer will guide you through the steps required to install Papyrus on your computer.
WARNING: This computer program is protected by copyright law and international treaties. Unauthorized duplication or distribution of this program, or any portion of it, may result in severe civil or criminal penalties, and will be prosecuted to the maximum extent possible under the law.
Cancel
< Back
Next >

The install program will check for the necessary disk space and will give you the default windows program group in which the Papyrus icon will appear after installation.

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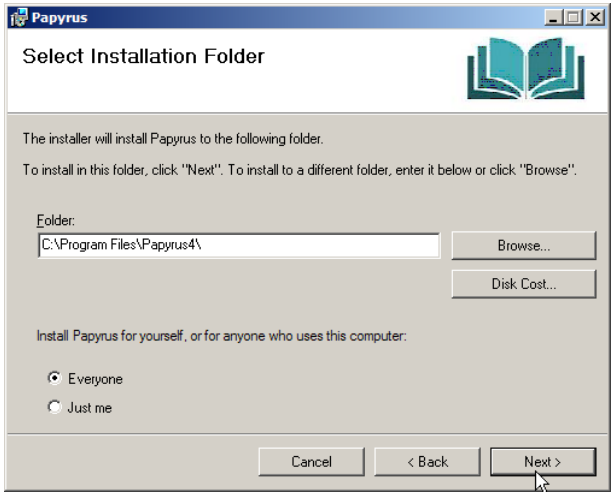
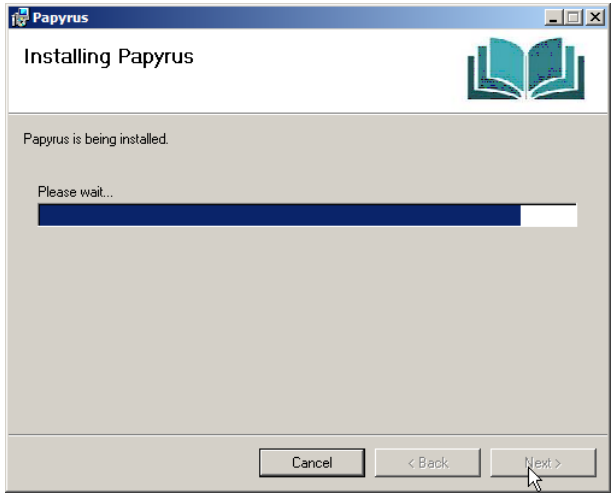

Papyrus
Select Installation Folder
The installer will install Papyrus to the following folder.
To install in this folder, click "Next". To install to a different folder, enter it below or click "Browse".
Folder:
C:\Program Files\Papyrus4\
Browse...
Disk Cost...
Install Papyrus for yourself, or for anyone who uses this computer:
Everyone
Just me
Cancel
< Back
Next >

Papyrus will now install and keep you up to date as to how far it is in the installation process.



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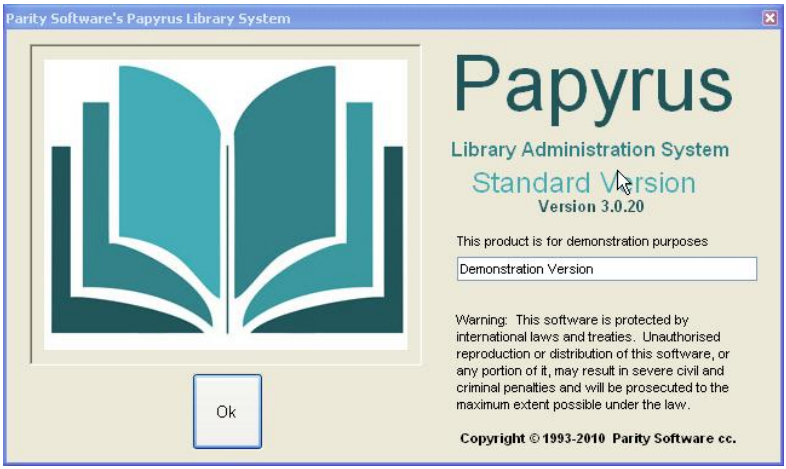
Chapter 3

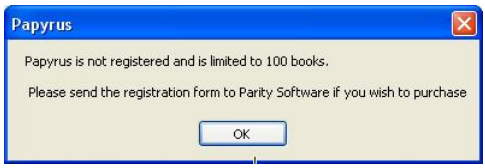
Getting Started

Getting started with the BackOffice Program

To open the Papyrus program click on Start, All Programs, Papyrus. A welcome screen will appear. Click on OK.


Parity Software's Papyrus Library System
Papyrus
Library Administration System
Standard Version
Version 3.0.20
This product is for demonstration purposes
Demonstration Version
Warning: This software is protected by international laws and treaties. Unauthorised reproduction or distribution of this software, or any portion of it, may result in severe civil and criminal penalties and will be prosecuted to the maximum extent possible under the law.
Copyright © 1993-2010 Parity Software cc.
Ok

Pass the welcome screen by clicking OK. You will be presented with the screen saying that Papyrus is not registered and is limited to 100 books.


Papyrus
Papyrus is not registered and is limited to 100 books.
Please send the registration form to Parity Software if you wish to purchase
OK

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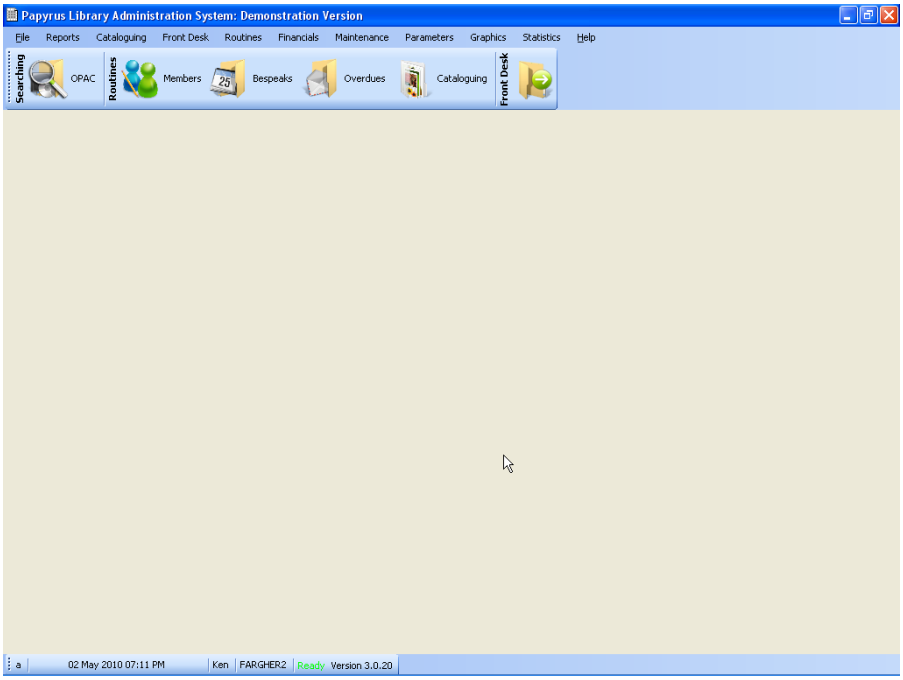
The following main screen will appear. This screen is the source of all cataloguing and management activities.



Registering the Package

When you open the BackOffice program it will immediately prompt you that the software is not registered. Unless registered the software will be limited to 100 book entries.

On the Global Parameter Screen, please fill in your company name in the big block at the top of the screen as indicated below.

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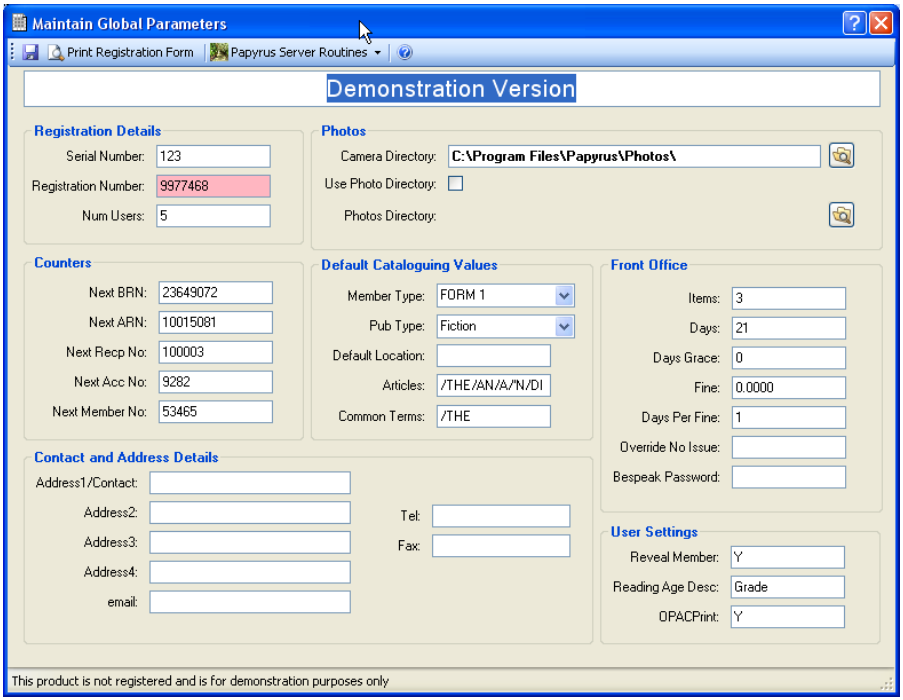

Press the “Print Registration Form” button on the Menu Bar. Fill in the requested information and fax it to the fax number as indicated on the form.

.

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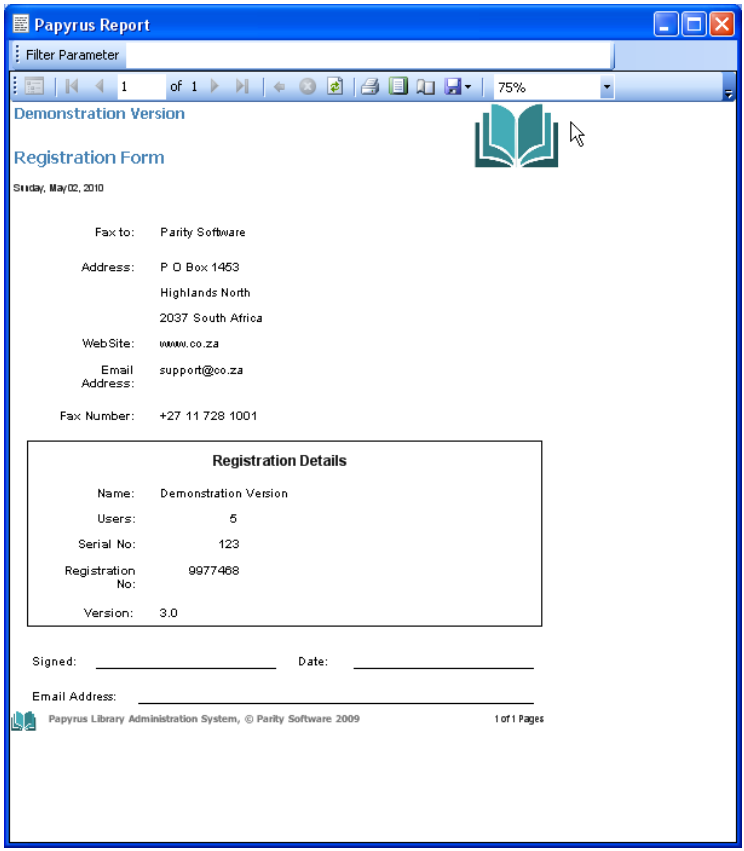

Parity Software will email a registration number back to you. Please note that on Serial Number and Registration Number fields, there will be a default number 999. This will not mean that the software is registered. Once your registration form is received, Parity Software will issue you with correct registration and serial number. Fill in the registration number in the Global Parameters under Registration Details.

How do I see that the software is registered

After completing the above procedures, on the Global Parameters Registration Details, there is a Registration Number. If the software is

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registered, the number will be Green. If it is not registered the number will be red.

Papyrus Server Routines

Get Latest Papyrus Version- will display the latest Papyrus version

GET AEF Status – will display when your Annual Enhancement Fees are Due

Update Contact Details which will send through the latest Contact and email details to us

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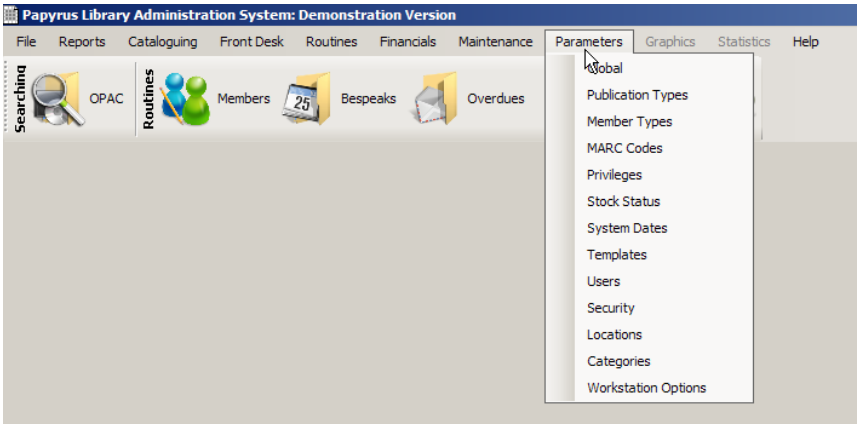
Chapter 4

Parameters

For each of the Parameter Screens, the important thing to remember is to click the SAVE button on the Menu Bar. This is to ensure that if unintentional changes are made by pressing the wrong key, or deleting the wrong record that you are able to cancel the changes by not clicking the SAVE button. If you are happy with the changes made, click the SAVE button. This is a major change from version 3.0 to version 4.0.

Global Parameters

It is extremely important to set-up the Global Parameters before you start using the software, seeing that it is the basic information from which the software is working. Select the Parameter Menu and then the Global option.



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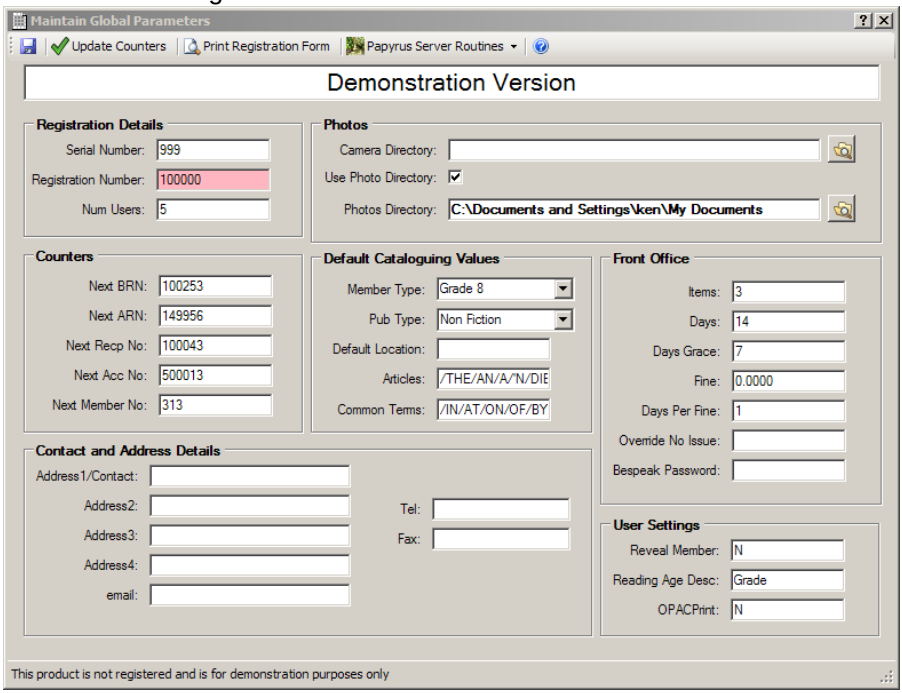
Enter the following information.



Organisation Name

The name of your organisation is in the top large block. This will be the licensed name for use of Papyrus. This should have been entered during the Registration procedures.

Registration Details

Serial Number
This is generated by the system. It is used for registration purposes only.

Registration Number
Once the registration form has been printed, enter the registration number that will be on the registration form when it is received back from Parity Software.

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Number of Workstations
This refers to the number of computers that are connected to the network to share the software. This means that if you are licensed for 5 workstations only, you will not be able to use the program on the 6th workstation. To be able to use the 6th workstation, you must contact Parity Software to get the registration number based on the number of workstations you may need to use.

Counters

Next BRN
Enter 100000 for the next *Bibliographic Reference Number*. This is used to uniquely identify each bibliographic reference in the system. If you wish to start with a known sequence number, then enter it in this field. We recommend you start with a 6-digit number, which will make the numerical sorting of items easier.

Next ARN
Enter 100000 for the next *Authority Reference Number*. This is used to uniquely identify each Authority in the system.

Next Receipt Number
Receipts are printed for each fine calculated on items that are returned late. Enter a receipt number, which will be incremented, for each receipt printed.

Next Accession Number
Enter the next unique identification number e.g.: 234 if your next accession number is to be 2001/234 for stock. Papyrus automatically puts in the year.

Next Member Number
This is the next available Member Number

Default Cataloguing Values

Default Member Type
The default member type is activated when a new member is created. Default means that it is the one automatically selected by the system.

Default Publication Type
The default publication type is activated when a new Bibliographic item is

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created. Default means that it is the one automatically selected by the system.

Default Location
This is the Stock Location for multiple Library Locations. Leave it blank for a single library

Articles
This field can be used for Articles to be excluded from the beginning of titles, when searching for certain subjects. More than one Article can be entered and are divided by /. For example in a title like “The Dog and the Cat” you can exclude “the” when the titles are sorted.

Common Terms
This field can be used for Common Terms that are to be excluded from searching. More than one Article can be entered and are divided by /. For example words like “in; at; on; of” etc., could be excluded.

If you wish to leave a field empty i.e. no terms, then type / into the field as it will not work if it is empty.

Front Office

Items
The usual number of publication type items each member may loan. If there is no quota in your Library, please enter a high number such as 999

Days
The usual number of days an item may be loaned.

Days Grace
The number of day’s grace, after the due date, before the fine is calculated.

Fine
The fine in monetary terms e.g.: R2.78.

Days per Fine
The number of days between each fine. This can be 1 for each day and 7 for a week.

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User Settings

Reveal Member
If set to Y (yes), it will show the borrower's name on OPAC searches when right clicking on the BRN.

Reading Age
The description of what the reading ages mean. Default is 'Grade'

OPAC Print
If set to Y (yes), will always show the Print button on all OPAC search screens. If set to N (no), will take the user option in the User settings

Photos

Camera Directory
This is used if the camera linked to the computer creates a directory. This is not normally used as most video cameras use the WIA or Windows Image Acquisition standard for *grabbing* images.

Use Photo Directory
If the member photographs are all in a directory on your computer, or you wish to put the photographs of members on a directory rather than into the database, select this item. However, it is easier for Papyrus to store the images in the database so this item is normally unselected.

Photos Directory
This is the directory where all photos are saved if the above option is selected.

Publication Types

Set up this parameter before starting to add items to Papyrus. Use the BackOffice Parameters/Publication Types screen to enter the various types of publication or stock types in the library. For example the library may keep books, tapes, videocassettes, journals, periodicals, clippings, photos.

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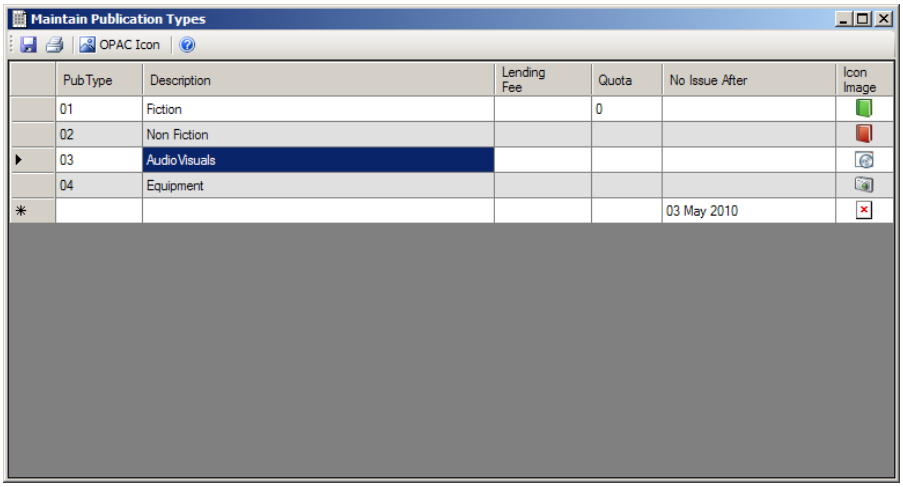

Under the Pub Type column enter a 2-digit number.

Description
Enter the description in the Description column egg: Specials could be described as anything that is not included in the other types. Papyrus will display a colourful icon describing the type next to an item in OPAC if you wish. Select the icon by clicking the OPAC Icon button from the menu.

Lending Fee
This is the fee that added to the account if an item is borrowed. Set this to zero if there is no fee.

Quota
This specifies the total number of items of this specific publication type that any member can borrow. If there is no maximum, set the value to -1 to clear the field.

No Issue after
This date column enables you to limit issue dates for publication types e.g.: if you want videos back by a certain date but all other items can still be issued, then change the date for videos issue here. If you do not what any date, unselect the checkbox in the column.

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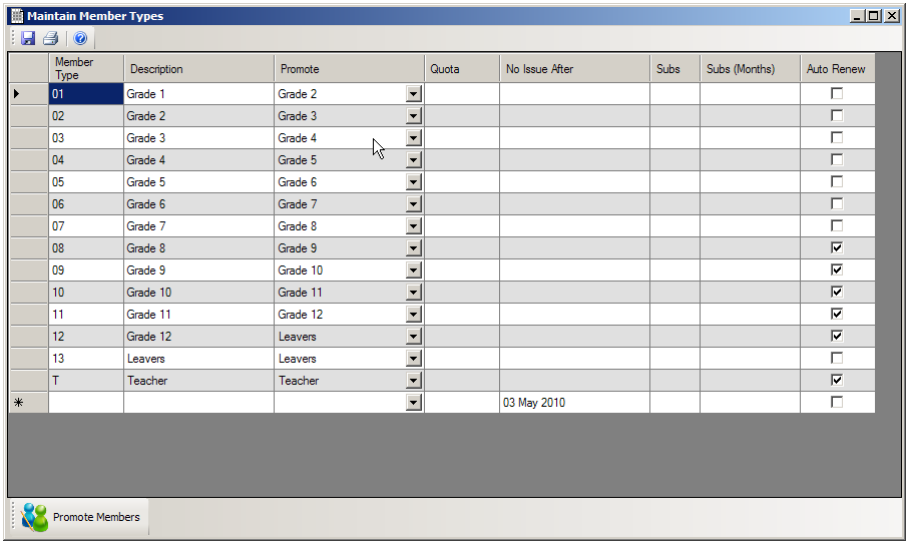
Member Types

Use the Member Types screen to enter the different categories of library members. For example, the library may have Grade 8, Grade 10, Librarians, Teachers, Parents, etc. as members. This enables you to give differing privileges to different groups eg: older pupils may borrow more books than younger pupils and staff may keep items for longer than pupils.



Member Type	Description	Promote	Quota	No Issue After	Subs	Subs (Months)	Auto Renew
01	Grade 1	Grade 2					☐
02	Grade 2	Grade 3					☐
03	Grade 3	Grade 4					☐
04	Grade 4	Grade 5					☐
05	Grade 5	Grade 6					☐
06	Grade 6	Grade 7					☐
07	Grade 7	Grade 8					☐
08	Grade 8	Grade 9					☑
09	Grade 9	Grade 10					☑
10	Grade 10	Grade 11					☑
11	Grade 11	Grade 12					☑
12	Grade 12	Leavers					☑
13	Leavers	Leavers					☐
T	Teacher	Teacher					☑
✳				03 May 2010			☐

Under the Member Type column enter a 2-digit number. Enter the Member description in the Description column.

Promote
Under Promote, type in the category to which the member will be promoted the following year e.g.: Grade 8 to Grade 9. If no promotion is to occur then type in the same Member Type number as is currently displayed for the Member Type.

Quota
Quota is the total number of items that a member may have out on issue at

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any one time irrespective of Publication Type. If you do not have a restriction, please enter -1 to clear the field.

No Issue After
Issue until type in the date until which issues are allowed for this category of user. Uncheck the date if there is no restriction.

Subs
Under subs enter the library subscription fee in monetary terms eg: R2.00 or R0.00 if no subscription system is in operation.

Subs (Months)
Under months, type in the number of months for which the subscription is valid.

Auto Renew
Auto renew type in Yes or No depending on whether you want the subscription to be automatically renewed.

Privileges

Before you enter this option, make sure that the ***Front Office Values*** in ***Global Parameters*** are correct. These will be used to set up the privilege for each Member Type and each Publication type.

You may scroll around the screen updating the grid with the relevant details. If the number of stock types or member types is large, you may filter them by clicking on the Publication Types or the Member Types buttons on the Menu Bar.

Privileges enables you to determine the quota/number of a Publication type that may be borrowed by a certain Member type, for a certain period and the grace period before the fines get calculated.

Items
This is the maximum number of items that a member can borrow.

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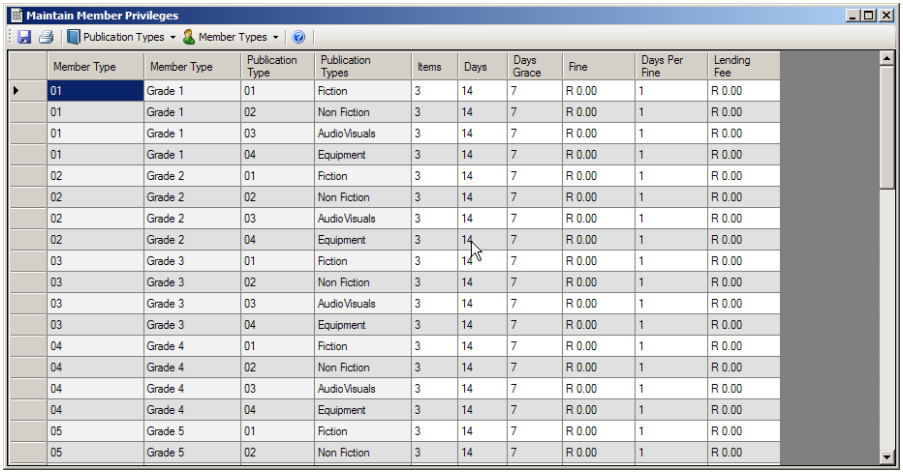
Days
This is the number of Calendar days that will be added to the current date to calculate the Due Date for the return of the item.

Days Grace
This is the number of days added to the return date before any fines are calculated.

Fine
This is the fine that is added to the Member's Account. This fine is charged for each *Days Per Fine* period. If no fines are charged, set the *Fine* to zero and the *Days Per Fine* to 1. If fines are charged on a daily basis, set the *Fine* to the amount charged and the *Days Per Fine* to 1. If they are charged on a weekly basis, set the *Days Per Fine* to 7.



Member Type	Member Type	Publication Type	Publication Types	Items	Days	Days Grace	Fine	Days Per Fine	Lending Fee
01	Grade 1	01	Fiction	3	14	7	R 0.00	1	R 0.00
01	Grade 1	02	Non Fiction	3	14	7	R 0.00	1	R 0.00
01	Grade 1	03	Audio Visuals	3	14	7	R 0.00	1	R 0.00
01	Grade 1	04	Equipment	3	14	7	R 0.00	1	R 0.00
02	Grade 2	01	Fiction	3	14	7	R 0.00	1	R 0.00
02	Grade 2	02	Non Fiction	3	14	7	R 0.00	1	R 0.00
02	Grade 2	03	Audio Visuals	3	14	7	R 0.00	1	R 0.00
02	Grade 2	04	Equipment	3	14	7	R 0.00	1	R 0.00
03	Grade 3	01	Fiction	3	14	7	R 0.00	1	R 0.00
03	Grade 3	02	Non Fiction	3	14	7	R 0.00	1	R 0.00
03	Grade 3	03	Audio Visuals	3	14	7	R 0.00	1	R 0.00
03	Grade 3	04	Equipment	3	14	7	R 0.00	1	R 0.00
04	Grade 4	01	Fiction	3	14	7	R 0.00	1	R 0.00
04	Grade 4	02	Non Fiction	3	14	7	R 0.00	1	R 0.00
04	Grade 4	03	Audio Visuals	3	14	7	R 0.00	1	R 0.00
04	Grade 4	04	Equipment	3	14	7	R 0.00	1	R 0.00
05	Grade 5	01	Fiction	3	14	7	R 0.00	1	R 0.00
05	Grade 5	02	Non Fiction	3	14	7	R 0.00	1	R 0.00

Lending Fee
This is the charge added to the Member's account, every time an item is issued.

MARC Codes

A MARC Code refers to a *Machine Readable Cataloguing Code*. Papyrus is based on both SAMARC, which is the South African standard used for

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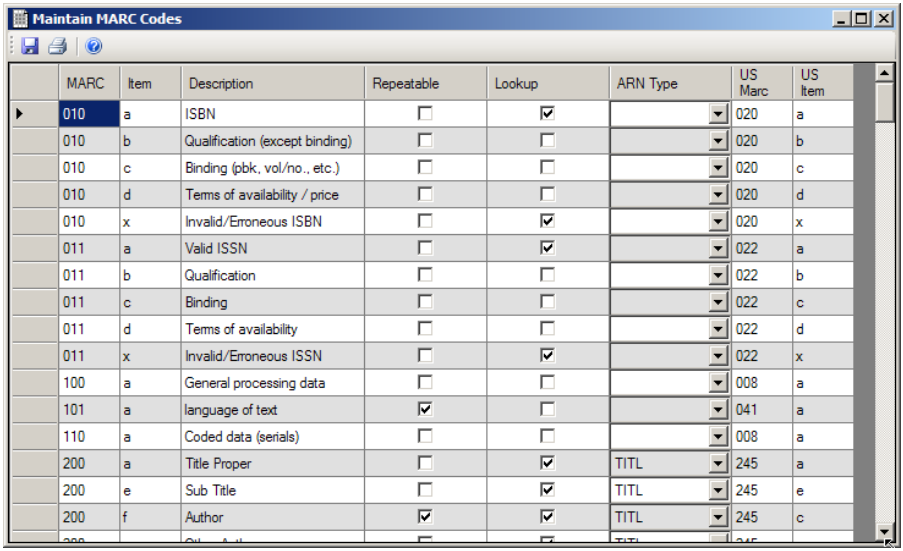
bibliographic data transfer, and US MARC. Print out a list of the MARC codes to familiarise yourself with them and see Annexure 1. Pressing the Print buttons to do this.



MARC	Item	Description	Repeatable	Lookup	ARN Type	US Marc	US Item
010	a	ISBN	☐	☑		020	a
010	b	Qualification (except binding)	☐	☐		020	b
010	c	Binding (pbk, vol/no., etc.)	☐	☐		020	c
010	d	Terms of availability / price	☐	☐		020	d
010	x	Invalid/Erroneous ISBN	☐	☑		020	x
011	a	Valid ISSN	☐	☑		022	a
011	b	Qualification	☐	☐		022	b
011	c	Binding	☐	☐		022	c
011	d	Terms of availability	☐	☐		022	d
011	x	Invalid/Erroneous ISSN	☐	☑		022	x
100	a	General processing data	☐	☐		008	a
101	a	language of text	☑	☐		041	a
110	a	Coded data (serials)	☐	☐		008	a
200	a	Title Proper	☐	☑	TITL	245	a
200	e	Sub Title	☐	☑	TITL	245	e
200	f	Author	☑	☑	TITL	245	c

Although initially daunting, there are ***only*** a few that need to be known. These are:

010a	ISBN
200a	Title Proper
200f	1st Statement of Responsibility (Author as written in the book)
210d	Date of Publication
215a	Extent of Item – number of pages
300a	Text of notes
600a	Subject
700a	Author Surname

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700b	Author Initials

Templates

This feature gives Papyrus is ability to make cataloguing easy. Each Publication Type is set up based on a pre select set of MARC codes. This means that you don't need to the MARC codes to catalogue an item.

Please set up these templates before adding items to Papyrus. Once you have familiarised yourself with the MARC codes, templates for each publication or stock type must be set up. This will allow a default set of MARC codes (template) to be displayed when a new stock item is catalogued. Select the publication type and this will allow you to enter new MARC codes together with the default (automatically selected) values. In Annexure 2 you will find a list of the default stock MARC codes.

Add Default Template
The default button provides a default template for cataloguing purposes i.e. the standard or most common set of codes.

See Chapter 6 Cataloguing Rules for help on which fields to include in your templates.

Publication Type
Use the Publication Type button on the Menu Bar to select the type of item e.g.: Fiction, videos, charts etc

MARC and *Item*
Under Marc and Item type in the code for the field you wish to use for your bibliographic description

Description describes the field chosen

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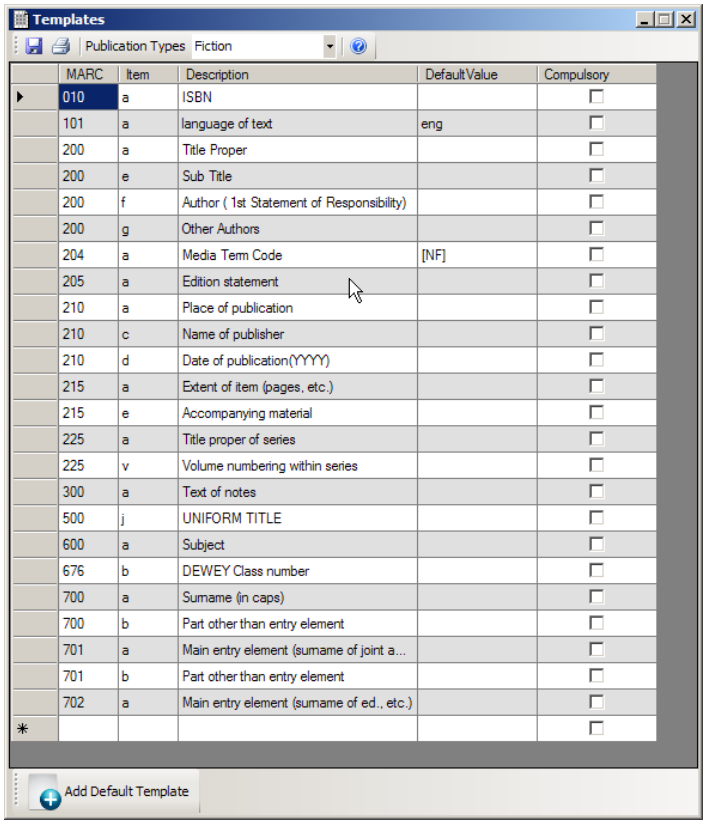

MARC	Item	Description	DefaultValue	Compulsory
010	a	ISBN		☐
101	a	language of text	eng	☐
200	a	Title Proper		☐
200	e	Sub Title		☐
200	f	Author (1st Statement of Responsibility)		☐
200	g	Other Authors		☐
204	a	Media Term Code	[NF]	☐
205	a	Edition statement		☐
210	a	Place of publication		☐
210	c	Name of publisher		☐
210	d	Date of publication(YYYY)		☐
215	a	Extent of item (pages, etc.)		☐
215	e	Accompanying material		☐
225	a	Title proper of series		☐
225	v	Volume numbering within series		☐
300	a	Text of notes		☐
500	j	UNIFORM TITLE		☐
600	a	Subject		☐
676	b	DEWEY Class number		☐
700	a	Surname (in caps)		☐
700	b	Part other than entry element		☐
701	a	Main entry element (surname of joint a...		☐
701	b	Part other than entry element		☐
702	a	Main entry element (surname of ed., etc.)		☐
*				☐

Default Value
This is any information that you wish to automatically appear as the default for that field when you catalogue a new item.

Compulsory
Under Compulsory *check* the field if you want it to be compulsory for this field to be included in each bibliographic description or *uncheck* it if you wish to leave the field flexible for you to choose at the time of cataloguing.

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Languages

This option gives you different language codes. A list of languages may be printed out for reference purposes. The existing codes on your database are internationally recognised codes. A list of codes can be found in Annexure 3.

System Dates

The System Dates screen allows you to enter National, School or Company Holidays exclude them as return dates. These are used to correctly calculate the loan period in the Front Office system.

PLEASE NOTE THAT FOR SYSTEM DATES TO WORK, YOU MUST CHECK THE DATES HERE AS WELL AS IN MEMBER TYPES AND PUBLICATION TYPES.

Also remember that the system will check all dates and limit according to the earliest ones set e.g.: If Staff issues are limited by Member Types to 6 December but Publication Type dates limit Serials issue to 15 November, the latter date will apply.

Holidays
Type in the *Starting Dates* that the library will not be open and the *Ending Dates* and type in a Description. The *Add Holidays* button will add dates for that range of dates. The *Delete Holidays* will remove the dates. Dates can be typed into the grid. e.g.: if school returns on 5 September then type in 4 September as the last day of the holidays. You do not need to add in weekends if the library is closed on these days as this is handled by the next option.

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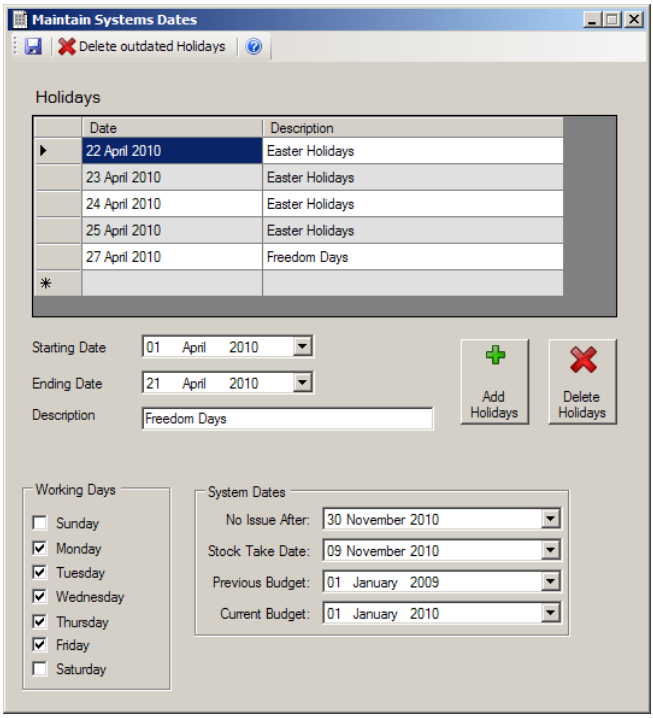

Working Days
Click the working days in the Working Days column at bottom left i.e. if the library is closed over weekends, then do not click on Saturday and Sunday.

No Issue After
Issues can be limited to a date by typing in the date that you want the items returned e.g.: first day of a new school term. The last day of a Stock Take may be indicated in the columns at the bottom.

Stock Take Date
This is covered in detail under Stock Takes, but this is the date for which all items will be marked as being found in the library when scanned during the stock take.

Previous Budget
This is the date which started the previous Budget. The Current Budget is

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the date on which the current Budget Started. This provides a period for the previous Budget – the period from the Previous Budget to the Current Budget. The Current Budget would be the date from the Current Budget up until the present date.

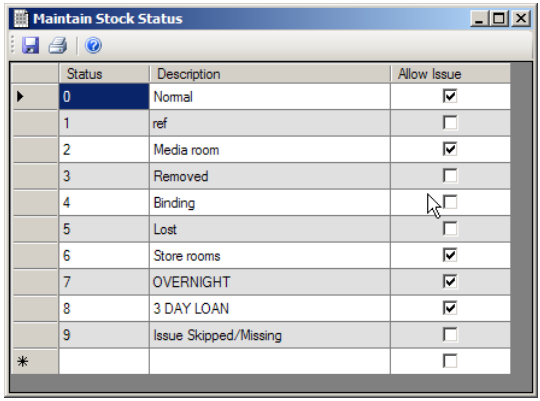
If the previous Budget is 1 January 2009 and the Current Budget is 1 January 2010, then the Previous Budget runs from 1 January 2009 to the 31 December 2009. The Current Budget will run from the 1 January 2010 until the current Date. Change these on a year-to-year basis.

Stock Status

This screen allows you to enter various stock statuses and the availability of stock for issuing purposes. Typically, this is used to indicate stock that is on reserve, sent for binding, lost, on order. Stock that is available for issue in the normal manner, may have the stock status as normal.

Please note that the field is **only one** digit long.

This stock status is indicated in the bibliographic description of an item under stock in cataloguing and also on all OPAC enquiry screens.



Status	Description	Allow Issue
0	Normal	☑
1	ref	☐
2	Media room	☑
3	Removed	☐
4	Binding	☐
5	Lost	☐
6	Store rooms	☑
7	OVERNIGHT	☑
8	3 DAY LOAN	☑
9	Issue Skipped/Missing	☐
*		☐

Users

This will list all workstations that use Papyrus.

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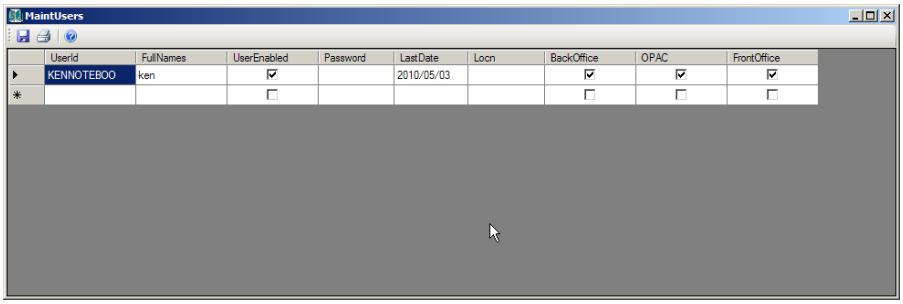

Remove the users that are needed in the system as this will use up Papyrus licenses.

Password
For future Use

Last Date
The Last Date a user loggen on

Locn
The Location of the user for multisite or remote site libraries. If you have a single library, leave this blank. Having a value in this field will limit all OPAC searches to a specific Location. Cataloguing will default the LOCN to this value for a Librarian who is Cataloging.

BackOffice
This will allow the user to access the Parameters and Cataloguing options in Papyrus.

OPAC
This will enable OPAC searching

Front Office
This will enable Issuing and Returning of Items to Members

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Chapter 5

Library Members

Capturing of Library Members

Once the Member Types have been captured, in the Parameter Maintenance section (See Chapter 4 of this user manual), library members may be entered.

Click on the Members Button in the Picture Bar of the Main Screen.

The following screen appears

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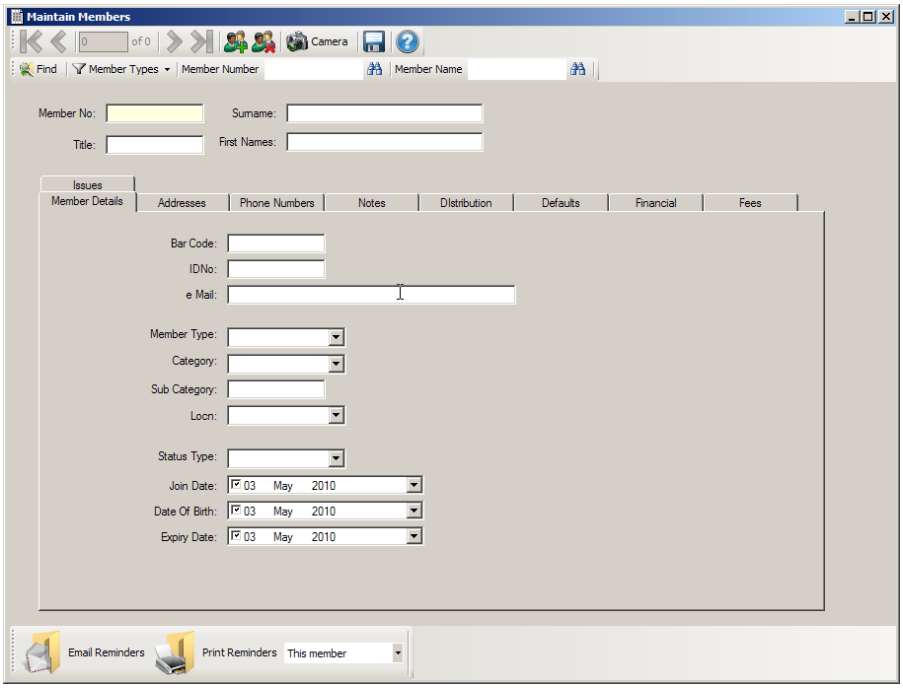
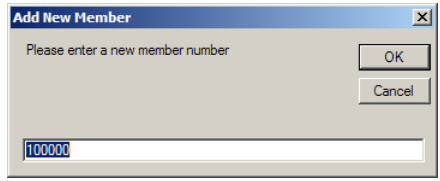


New members

Click the New Member Button on the Menu Bar of the screen, the one with the green cross

The following screen will appear when entering new members.



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Please enter all the necessary details of the new library member. Many of these are self explanatory. For example, the persons surname, first name, title, phone, email etc.

There are certain fields that require explanation.

Member type is based on those in Parameters, Member Types.

Status (this determines whether a member may borrow or not – there are no templates to be set up as Papyrus has preset these).

Barcode (if members have library cards with barcodes on them). This can differ from the Member's Number and can change if the Library ID Card of the member is lost. A new number can be issued and a new Library ID card issued.

Family code (to identify members of the same family). This affects maily public libraries and determines if other members can borrow on behalf of others such as a parent borrowing an item on behalf of their child.

Location (branch of library used)

Category (as set up in BackOffice Parameters Categories) indicates their school standard i.e. Member Type indicates Form 1 and Category indicates Form 1R. Category could also be Staff and Sub-Category Drama Department.

Expiry date is the expiry date of the member's library subscription.

Type in the addresses, notes of interest to you concerning the member (if changing data in the Notes field, never leave the field empty but leave in one letter or even a full stop) and their financial (payments i.e. credits) and fees (debits) details.

Defaults is a field in which you can record when a member defaults as a member egg: loses or damages an item, does not pay fees etc

If a certain member needs to receive periodicals on a regular basis it needs to be entered in the Distribution section of the members details.

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Finding existing members

If the member has already been entered into the system, the member may be found by various means.

Pressing the Find button will open the Search Member screen which allows you to find members in various ways.

Entering the Member Number in the *Member Number* text box and pressing enter or clicking the Binoculars will search by Member Number, ID Number or Barcode.

Entering the surname or the first few letters of a name into the *Member Name* and pressing enter name and then pressing Enter or clicking the Binoculars will search the Surname and First Names fields.

If the member you are looking for is not in this search you can amend your search or start a new search from the results of this search. You might need to add them as a new member.

You can also browse through all the Members in a member type and Category by clicking the Member Types Button. The Drop Down Button will show two levels of items. The first is the Member Type and the second is the Categoies that exist for that member Type. You can select {All Members} to see every member, or select the first level Member Type, or the second level Category to narrow your search. You can use the Navigation arrows Buttons to browse through each Member.

From the member's details it can be seen what stock has been issued to a specific member by clicking on the Issues tab.

Updating existing members

Simply delete the information in the required field and type in the new information. Member numbers cannot be changed.

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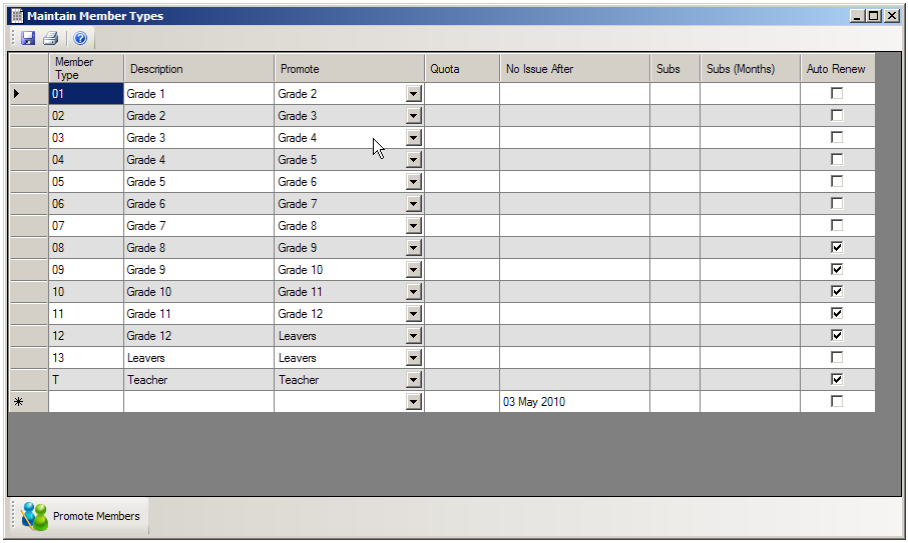
Promoting members

When promoting members e.g.: from one class to another, select Parameters, Member Types. To select the members to promote, just highlight one row and click Promote button. This has to be done row by row. Ensure that the correct Type numbers have been entered into the promote column. See Contents/ Member Types.



Deleting existing members

First ensure that the member has no items out on issue. Find the member record in Members. Click on the Delete button on the menu bar.

The system will ask you if you are sure that you wish to delete this member. Click OK if this is the case. If there are items that are currently issued to the member, the member cannot be deleted. All the issue information about the member will be retained for history purposes.

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Chapter 6

Cataloguing Rules

Cataloguing is easy. If you need simple cataloguing it can be as easy as entering just the Title! You can also just add the Author and Subject! The Tenplates in Papyrus help you to make the process easy. The Default Template is what is suggested and following this will be more than adequate for most libraries.

It would be useful to follow this chapter, but it is not necessary. If correct Cataloguing or sophisticated Cataloguing is required, the follow Cataloguing Rules in this chapter. Otherwise skip to the next chapter on EasyCat.

There is no point in re-inventing the wheel. The following policy provides for the use of a subset of the Anglo-American cataloguing rules (2nd ed., 1988 revision) edited by Michael Gorman and Paul A. Winkler (Chicago: American Library Association). The school librarian does not need to acquire this 677-page work, but should unquestionably obtain a copy of The Concise AACR2, 1988 revision by Michael Gorman (Chicago: American Library Association, 1989) to implement the policy advocated in EasyCat on Papyrus.

MARC (Machine Readable Cataloguing)

Papyrus is based on SAMARC, which is the South African standard used for bibliographic data transfer. South Africa is in the process of adopting the U.S.A. standard, USMARC, and Papyrus has followed suit as the situation clarifies. This is of little concern to school librarians, as the EasyCat mode of Papyrus hides the MARC fields.

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Minimal and Selective Cataloguing

The Anglo-American cataloguing code is a proud achievement of Western civilisation. It is a vast tool that enables a librarian to catalogue in great detail not only books, videos and other vehicles of information but even artefacts and natural objects such as stones.

The critical phrase in this context is 'in great detail'. The level of detail required for a catalogue entry varies from library to library. n a multi-million volume library spread over many floors or even buildings much detail is warranted in order that items may be uniquely identifiable, and to allow the patron to decide whether or not to devote the necessary time to finding and examining the book. By contrast, school libraries have small collections housed (usually) in a single room. These two factors dictate a policy of minimal cataloguing, of including but few details in the descriptions. In a large library there are numerous authors with similar or identical names, and many books with identical titles; in a small library there are few. It is time-consuming to locate books on the shelves of large libraries; in small libraries it is swiftly done.

Regrettably, many school librarians are guilty of including cataloguing details that are appropriate only in large libraries. The waste of time is enormous, the lack of progress demoralising. The school librarian wise enough to follow a policy of minimal cataloguing will have a work rate many times that of, say, a cataloguer in a university library.

Minimal cataloguing thus means creating brief catalogue entries, leaving out many details, but including salient elements, so that the following three types of questions can be answered:

> Does the library have a copy of The Hobbit?
> Does the library have any books by William Kotzwinckle?
> Does the library have any material on Mount Everest?

If, in addition, the catalogue tells the user when the book was published and how thick it is, an entirely satisfactory entry will have been made.

By selective cataloguing is meant NOT cataloguing certain categories of stock. For the hard-pressed school librarian it is unwise to catalogue

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ephemeral materials such as newspaper clippings, pamphlets and periodicals. These certainly should be stocked, but should be controlled and retrieved by other, more economical methods, easily copied from other libraries, or discovered in manuals of librarianship.

What To Leave Out, and Why

ISBN

The book trade invented the wonderful system of International Standard Book Numbers, and indeed the only time that the school librarian needs it is when ordering replacement copies. To be sure, book dealers are very happy to be given the ISBN, but they are able and willing to accept an order if one provides them with author and title. Moreover, as books go out of print rapidly, the success rate in replacing books is low. The labour of recording ISBNs is therefore not justifiable. If you have a barcode on the book and a barcode scanner, then capture it as it is quick.

Name of publisher and city of publication

The average schoolboy or girl has no interest in the publication details of a book. For purposes of ordering replacement copies these details are, like the ISBN, nice to have, but not essential. Publisher and city of publication should therefore be omitted from the description.

Series

Publishers' series exist because they are a valuable marketing feature, as they reduce the costs of typographical design and of printing and are popular with the public. If the series title is included in the cataloguing description, there will be the mild benefit of improved subject retrieval by means of text searches. On the negative side, some pupils may be confused by their presence. In the small library there is no compelling reason for including the series title. It should therefore be omitted.

Author authority file (author main entry)

As it seems almost heretical to propose omitting this element it is fitting to state the rationale fully, and to examine the pros and cons. The statement of responsibility comprises the name of the author as it occurs on the ***title***

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page, e.g. 'written and illustrated by R. H. Warring'. This means that all books by Warring can be retrieved without repeating his details in the author authority file. The same applies to corporate authors such as 'The Department of Health'. The advantage of not creating and maintaining an author authority file lies purely in the major saving in time. Capturing the names takes time, and so does solving the occasional thorny problems presented by the diverse types of personal names (Rules 30 - 44) and corporate bodies (Rules 49 - 56). The question is whether the improved author retrieval justifies this additional labour.

There are four problems associated with the absence of an author authority file.

a) Some authors have variant surnames, for example *Meindert de Jong* is sometimes given *as Meindert DeJong*. This author is not adequately retrievable by surname in the statement of authority field. There is also the problem of maiden name versus married name, etc.
   This problem occurs on such a small scale that it does not warrant the creation of an entire authority file. Moreover it can be circumvented by adding a 'correction' (AACR2 Rule 1·0F1): *Meindert DeJong* [i.e. *de Jong*].
b) Authors with variant forms of first names or initials will not be retrieved in *total* if these are included in the search term. This can be avoided by searching under surname only. Thus *SIMON* will retrieve *André Simon* as well as *André L. Simon* (not to mention a few other *Simons*).
c) The order in which the OPAC hit list appears is not helpful to the user who has a particular author in mind. Thus, the person searching for *Carpenter* might get a hit list such as the one below. This problem may be viewed as an inconvenience that can be tolerated.
d) There are no cross-references to guide the reader through these anomalies. This problem is a corollary of the other three problems. If there is no compelling need for an authority file, then there is also no need for cross-references.

As the statement of responsibility permits a virtually complete author approach, this Policy dispenses with an author authority file. Some school librarians may nevertheless decide to create an author authority file. Such librarians are advised to:

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a) Study Part 2 of *The concise AACR2* and apply these sensible rules. Whenever a problematic name is encountered (popes, royals, etc.) the librarian must display professionalism and look up the appropriate rule.
b) With the cut-and-paste facility it is easy to copy the full names into the authority file. It will therefore save a great deal of time NOT to capitalize surnames and NOT to reduce first names to initials.
c) ALWAYS check the authority file before adding an author.
d) Do not add dates. Two John Smiths writing different sorts of books does indeed sound problematic, but in a small library there is in fact no need to distinguish them.
e) Do not add spelled out forms of names such as Elliott, T. S. (Thomas Stearns). This is necessary in large libraries only.
f) If a book has more than one author, put only the first author into the authority file.

The four elements discussed above are the most likely to be included (unnecessarily) by the conscientious school librarian. Much else that is equally unnecessary should also be left out of the descriptions. In most cases the rationale would be the same, namely, that it is simply not appropriate to a small library.

What To Include, and Why

Title proper

This is the bedrock of any bibliographic description. Without it there is nothing. If an item has no title, it is in fact the cataloguer's duty to supply a title (Rule 1B6).

Other title information

a) Subtitle

The subtitle generally casts light on the title proper. It is also of critical value in title and subject retrieval. If a title proper needs clarification the cataloguer is duty bound to provide a subtitle (Rule 1E4).

b) Sub-subtitle

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Sub-subtitles generally shed further light on the title proper and also assist in title and subject retrieval. However, if the sub-subtitle is lengthy and does not further clarify the title proper, omit it (Rule 1E3).

Statement of responsibility (Rule 1F)

This is a brilliant invention, absent from the first edition of the Anglo-American cataloguing rules (1967), but gloriously present in the second edition. It solves many problems for the cataloguer, is easy to implement and is totally comprehensible and enlightening to the user. With the text search capabilities of modern computers it is now possible for the minimal cataloguer to jettison author authority files altogether, provided only that he include a statement of responsibility. First as well as other statements of responsibility are to be included (Rule 1F2).

Edition (Rule 2)

Different editions of the same book differ in regard to pagination, date, replacement price, etc. Yet the descriptions appear very similar. Inclusion of the edition statement dispels all doubt and confusion. Only a small percentage of books run to more than one edition. In cataloguing a normal first edition the cataloguer does not, as a rule, state which edition it is. For second and subsequent editions he does record the edition. When creating the record he will routinely check to see if the book has already been catalogued, and he will notice that there is already a first edition in the database. At this point he should call up that record and add an edition statement in square brackets, thus: [1st ed.]. This simple deed clarifies the OPAC display most gratifyingly.

Date of publication

The date of a document is one of its most important co-ordinates. If no date is given in the book, the cataloguer must estimate a date (Rule 4E2).

Extent of item (pages, etc.)

If the extent of items is omitted, the user can form no idea of the physical extent of the document. If the pages are not numbered, the librarian must count the pages and record the number in square brackets: [48] p. Here we deviate from *The concise AACR2*, which proposes 1 v. (one volume), a

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rather unhelpful description. For thick books the number should be estimated by counting, say, an eighth of the pages and then multiplying by eight. It should be recorded thus: ca. 200 p. (AACR2 Rule 2·5B7).

A subject approach

The overwhelming majority of books have titles and subtitles that explain what the books are about. This means that patrons can find material on most topics by doing searches in the title files. For example, a person who needs information on the town of Oxford can type 'Oxford', and 'The encyclopaedia of Oxford' and other titles containing the word Oxford will appear. There is no doubt that the title list can be used as a very powerful (albeit hit-and-miss) subject approach. On the other hand, a few examples of titles that do not clearly reflect the contents of the books are listed below:

- *Culture is our business*
  (deals with advertising in modern civilisation)
- *The western experience*
  (a general history of Europe)
- *Talking with children about things that matter*
  (Moral education & parenting)
- *Quanta*
  (Quantum theory)
- *Hurrah, we're outward bound!*
  (nursery rhymes)
- *Griekeland*
  (Ancient Greece)

Clearly searching under topic will not retrieve these titles. 'Greece' will not bring up 'Griekeland'. The minimal cataloguer can render them retrievable by creating a subject approach for this type of book (but not others). EasyCat on Papyrus recommends that an orthodox subject approach be created for all factual works. This is a major task, and the librarian may well wonder if it is worth the effort. Experienced librarians know that a reliable, professionally constructed subject approach is priceless, adding enormously to their own confidence in fielding reference queries and empowering users to find information without assistance.

Sears list of subject headings, now in its fifteenth edition (New York: H. W. Wilson, 1994. ISBN 0-8242-0858-7), is as indispensable to the librarian as

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a backpack is to a hiker, and must be acquired for the library. The older editions of *Sears* are not suitable for cataloguing on computer, as their cross-references are designed for card catalogues. Virtually every factual work must be given a *Sears* subject heading. Judicious cross-referencing should be done — Papyrus is designed to accommodate this.

This Policy advises librarians to enter *Sears* subject headings on one line, as they appear in the list. Substitute the long dash, which is not on the keyboard, with a space, hyphen, space:

egg: France - History - 1789-1799, Revolution. In this matter EasyCat on Papyrus deviates from SAMARC, which stipulates this format:

607 a France
607 x History
607 p 1789-1799, Revolution

Segmenting the subject heading in this way is a relic from the days when primitive computers could not cope with anything longer than a medium-sized word. In modern software, the sub fields add nothing what so ever to either display or retrieve. Why then, the reader may wonder, do they still exist? The answer lies in shared and centralised cataloguing practices. Large libraries routinely provide cataloguing records to each other, and are then locked into an outdated data transfer standard. Accordingly only school librarians who have plans of obtaining cataloguing records electronically from other sources need bother with the complexities of the SAMARC format. (In addition to Field 607; Fields 600; 601; 602; 605 and 606; all with different sets of sub fields, are deployed for different types of subject.) School librarians who wish to use the SAMARC fields correctly are advised to buy a copy of the SAMARC manual from the State Library, P.O. Box 397, Pretoria, 0001.

For extensive examples of cataloguing certain types of stock, please see Annexure 4.

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Chapter 7

Easy Cataloguing (EasyCat)

Please ensure that all BackOffice Publication Types, Templates, Global Parameters, Locations and Stock Status have been set up before starting to catalogue items onto Papyrus in EasyCat.

Although this seems a large, complicated screen, it is not. It has all the facilities there to make the process easier for you. To do this we will describe the process of Cataloguing a New Item and describe each of the features on the screen.

Sequence of steps for creating a new BRN or adding a new item

- Open EasyCat
- Create a new BRN
- Catalogue the BRN
- Adding Authorities (Optional but recommended)
- Add Stock
- Save the BRN

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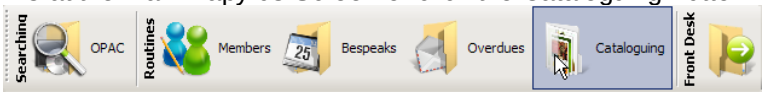
Open EasyCat

Press F3 at the Main Papyrus Screen or click the Cataloguing Button



Create a New BRN

Create a New BRN (Bibliographic Reference Number) by clicking the NEW button.

The BRN is automatically added by the system. The *BRN Number* is displayed on the screen.

The *ISBD* or International Bibliographic Description is set to {New} until the BRN is Cataloged.

The *Publication Type* that is created is the Default Publication Type in the Global Parameters. Change it to the correct type if need be.

The default MARC codes from the templates will be loaded and the cursor will be ready for you to capture the first item. Any items that have default values will be entered automatically. The template for the chosen stock type will be selected

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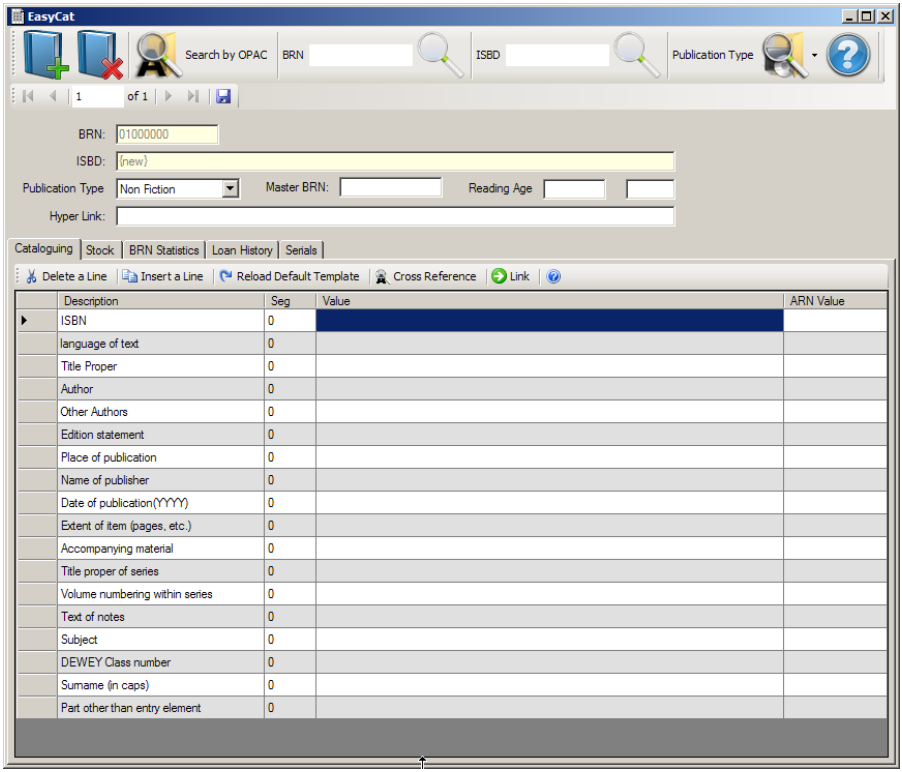

There are five tabs now available.

Cataloging
This is used to Catalogue the BRN

Stock
Here the stock items for the BRN are entered. Each BRN may have several copies of the same item. Each one is referred to as a stock item.

BRN Statistics
The details around the the Cataloguing Date, the Last Change Date and the Last User to make the change are displayed. There is also a detailed grid of the number of times an item has been issued and which member was the last to borrow the item.

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Loan History
A detailed list of every stock item for the BRN that has been loaned.

Serials
Used for Serials and the automatic receiving of the items.

Cataloguing the Item

Enter the relevant details in the various fields. Ensure that once you enter information in a field that you move either one row up or down to save the information. A pencil icon at the beginning of a row indicates that row contents have changed but have not yet been saved.

How to link to the Authority Files for searching in OPAC

From the previous chapter, the Authority fields such as Subjects, Authors, Publishers and Series can be linked to an Authority file. This additional step can be done quickly and simply. If you do not require an authority file, skip this step.

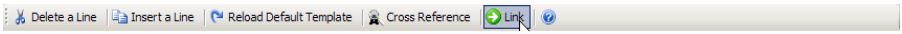
You will need to link fields to the Authority files to make them searchable by OPAC. Fields that can be linked are Publisher, Subject, Author, Series, Keyword (MARC field 650) and Dewey Class Number (MARC field 676b).

<u>The following sequence applies to all searchable fields.</u>

Type your subject into the subject field. Click the Cross Reference button to search for the Authority.

If the subject exists in the Authority files, then click on it and click OK. The subject will be added to the BRN. A number will also appear to the right of the field under the ARN Value column to indicate that the subject is linked.

If the subject does not exist in the Authority files, then click on the Link button.



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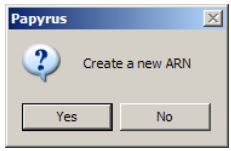
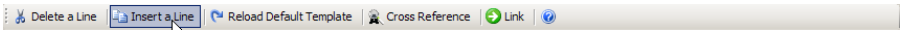
You will be asked to confirm whether a new ARN should be created.

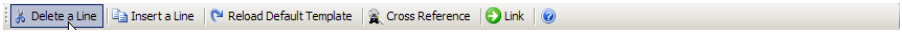


If you select YES a new ARN will be created and the line linked to it. A number will also appear to the right of the field under the ARN Value column to indicate that the subject is linked.

Inserting Lines
If you need a second Author or Subject, or any other field, click the Insert a Line on the tool bar.



Deleting Lines
Click the Delete Line to remove a line



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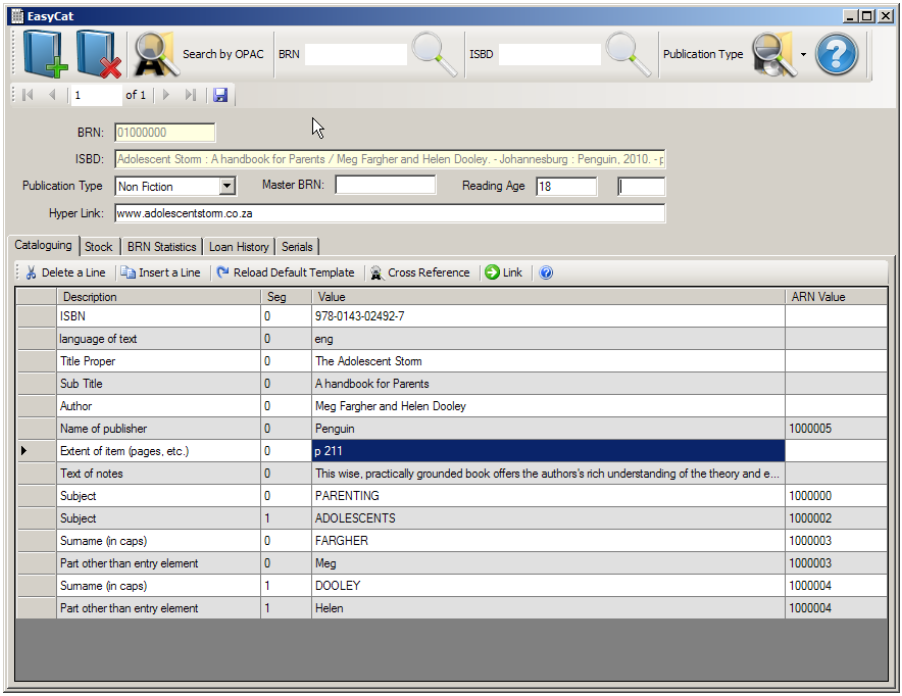
The item has now been catalogued


EasyCat
Search by OPAC
BRN
ISBD
Publication Type
1
of 1
BRN: 01000000
ISBD: Adolescent Storm : A handbook for Parents / Meg Fargher and Helen Dooley. - Johannesburg : Penguin, 2010. - p
Publication Type: Non Fiction
Master BRN:
Reading Age: 18
Hyper Link: www.adolescentstorm.co.za
Cataloguing | Stock | BRN Statistics | Loan History | Serials
Delete a Line | Insert a Line | Reload Default Template | Cross Reference | Link

Description	Seg	Value	ARN Value
ISBN	0	978-0143-02492-7	
language of text	0	eng	
Title Proper	0	The Adolescent Storm	
Sub Title	0	A handbook for Parents	
Author	0	Meg Fargher and Helen Dooley	
Name of publisher	0	Penguin	1000005
Extent of item (pages, etc.)	0	p 211	
Text of notes	0	This wise, practically grounded book offers the authors's rich understanding of the theory and e...	
Subject	0	PARENTING	1000000
Subject	1	ADOLESCENTS	1000002
Surname (in caps)	0	FARGHER	1000003
Part other than entry element	0	Meg	1000003
Surname (in caps)	1	DOOLEY	1000004
Part other than entry element	1	Helen	1000004

Adding Stock to the BRN

Stock in Papyrus is managed by a three tier system.

- Location
    - Collection
        - Shelf

All stock belongs to a location (usually blank for a single library), and in each location there are collections. In each collection there are shelves.

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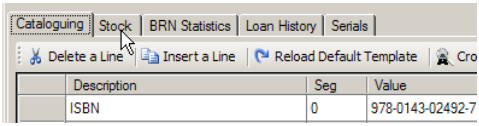
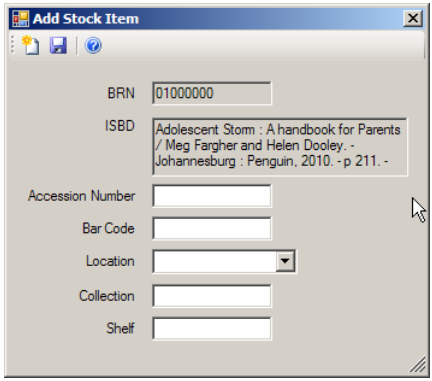
Using this system, useful stock reports can be produced which sorts the stock into the hierarchy of the location, collection and shelf.

To manage the stock select the Stock Tab



Click New Stock Item for a new automatic accession number.

You will now be presented with a screen asking for a new accession number, barcode, location, collection and shelf.



If you type in an existing accession number or barcode, a new item will not be added. To generate a new number, click the New button on the tool bar. A new accession number is generated from the Global Parameters and adds a year as a prefix. If the system says the accession number already exists then make sure that the Next Accession Number in the Global Parameters is correct.

Tab to the Bar Code and type or Scan in the barcode

Select a Location if you have a multisite library.

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Type in a collection if the item is part of a collection such as Slide, Reference, Africana, AV, JF, etc or leave it blank.

Type in the Dewey number or an applicable shelf code under Shelf

Now click the Save button to save the item.

Once the item has been saved, the following information about the item can be edited:

Status is Stock Status as set up in BackOffice

Volume (Vol) indicates the volume number of a set

Notes enables you to add notes about the item eg: that it has been charged to an account due to loss

Channel is for circulation purposes, for example, if national geographic magazines are received and need to be circulated to various staff members. You can indicate the channel under members egg: GEOMAG, their seniority on the list and how long they may keep the magazine. Then when you receive the magazine and place it into stock, put GEOMAG into the channel and click distribute. A list of all members who belong to the channel will appear on a circulation list. This will then be an aid to each member as to the length of time they may keep the magazine before passing it to the next person.

Tick **overnight** if item is to be placed on overnight loan. This will automatically issue the item for one day due the next day.

Save the BRN

This will remove blank cataloguing lines, update the search indexes and update the ISBD field to show the correct format for the title.

Removing blank lines preserves memory. Fields that you have indicated as compulsory in BackOffice MUST be filled in.

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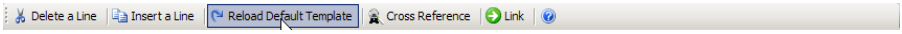
Should there be information you have missed out by mistake, to fill it in, press the Reload Default Catalogue button. This reloads all the fields in the template for you.



BRN Statistics show various statistics about the item.

Loan History shows the members that have borrowed the item

Serials Manages the serials of a BRN. The process of receiving them can be automated using this facility.

If item is a magazine to be distributed, then click **Distribute** and indicate the starting date.

Copying BRN information for sets of items

This facility provides for individual items to be part of a master set of items. Each separate item gets a separate BRN but they are catalogued as part of the set e.g.: 2 videos in a set, a set of slides or books in a series. When doing an OPAC search, the system will display a See Ref to emphasise that the item is part of a set.

Type in the information for the Master BRN i.e. the first copy. Note that it automatically gets a BRN number at top left. Then click on the Copy button at the bottom. A screen appears telling you from which BRN the copying will be done and gives you the BRN for the newly copied BRN. Click OK. The copied version appears. Note that the BRN is the same as on the previous screen mentioned and that now there is a Master copy BRN as well (the BRN of the copied BRN). This Master BRN will connect all the items in the set. OPAC will also indicate this Master BRN.

Click on the icon next to the Master BRN to connect the individual parts.

Duplicate accession numbers and barcodes

For the system to work effectively and to give you the accurate information, duplication of Accession numbers and Barcode numbers is not possible.

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When you have entered duplicates, the system will not allow you to save the record. Each stock item you enter must have a different Accession number and Barcode number.

When a second accession number is added to a BRN, the Shelf and Collection are duplicated for ease of entry.

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Chapter 8

OPAC

Definition of OPAC

The OPAC (*Online Public Access Catalogue*) system is available in all modules including the BackOffice system. When in EasyCat or the standard cataloguing, items may be found using the Find button.

Start searches by clicking on Step 1 at the top. Step 2 in the middle has numerous buttons to make searching simple.

There are two sections that can be searched. The Title Search which searches all the MARC 200 fields such as Title, Author, Publisher. The Authority search searches the Subject, Persons(Authors) and Publsihers fields.

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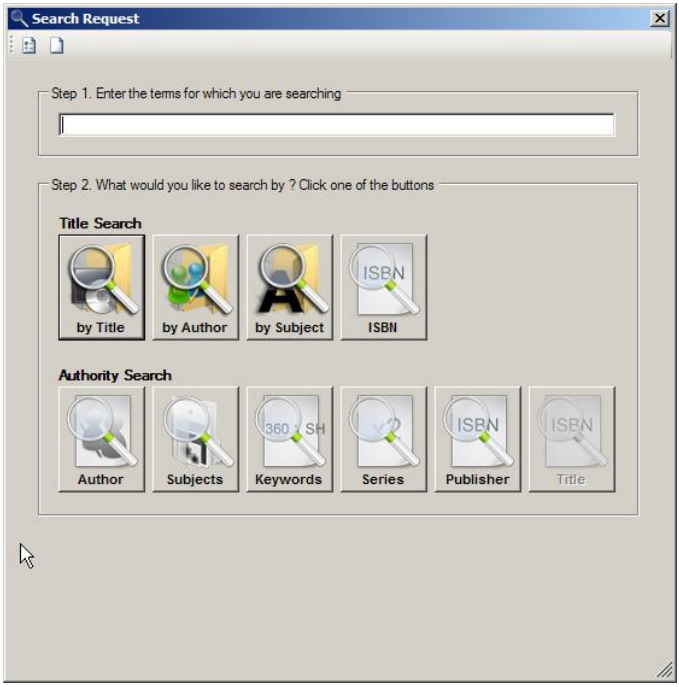
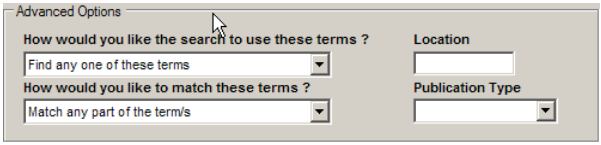


Scope of OPAC searching

There are two modes of searching - Basic and Advanced. To toggle between the two modes select the Advanced options button.

There are various options for Boolean searching and these can be selected using the two options. You can also limit the search to a specific location and publication type.


Advanced Options
How would you like the search to use these terms ?
Find any one of these terms
How would you like to match these terms ?
Match any part of the term/s
Location
Publication Type

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Enter the search term and click one of the buttons

By Title

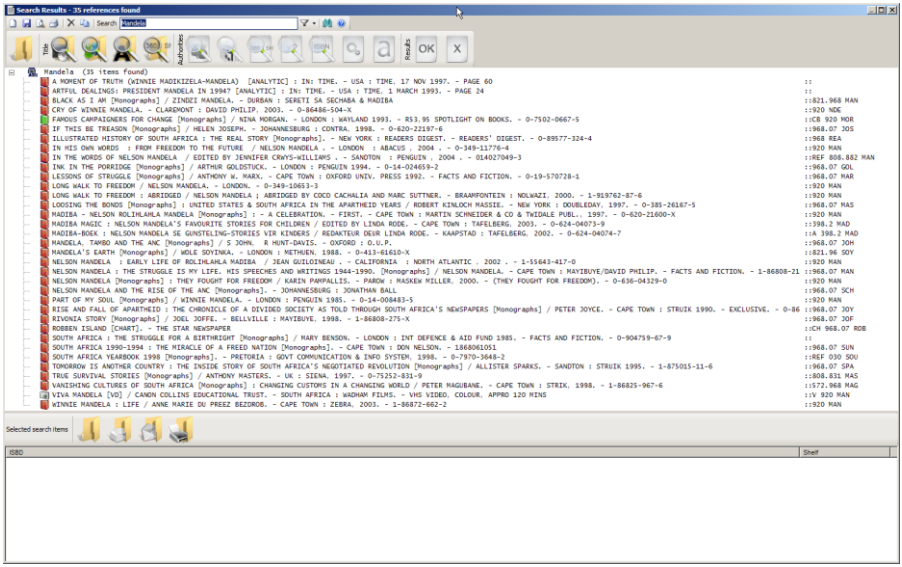
If standard cataloguing is used without the use of authority files, only the MARC 200 fields will be available in the basic search method under the Title button.

By Author

This will search the MARC 200f fields and MARC 700 fields.

By Subject

This will search the MARC 600a fields


Search Results - 35 references found
Search
Mandela
Title
Authorities
Results
OK
X
Mandela (35 items found)
A MOMENT OF TRUTH (WINNIE MADIKIZELA-MANDELA) [ANALYTIC] : IN: TIME. - USA : TIME, 17 NOV 1997. - PAGE 60
ARTFUL DEALINGS: PRESIDENT MANDELA IN 1994? [ANALYTIC] : IN: TIME. - USA : TIME, 1 MARCH 1993. - PAGE 24
BLACK AS I AM [Monographs] / ZINDZI MANDELA. - DURBAN : SERETI SA SECH&A & MADIBA
CRY OF WINNIE MANDELA. - CLAREMONT : DAVID PHILIP, 2003. - 0-86486-504-X
FAMOUS CAMPAIGNERS FOR CHANGE [Monographs] / NINA MORGAN. - LONDON : WAYLAND 1993. - R53.95 SPOTLIGHT ON BOOKS. - 0-7502-0667-5
IF THIS BE TREASON [Monographs] / HELEN JOSEPH. - JOHANNESBURG : CONTRA, 1998. - 0-620-22187-6
ILLUSTRATED HISTORY OF SOUTH AFRICA : THE REAL STORY [Monographs]. - NEW YORK : READERS DIGEST. - READERS' DIGEST. - 0-89577-324-4
IN HIS OWN WORDS : FROM FREEDOM TO THE FUTURE / NELSON MANDELA . - LONDON : ABACUS , 2004 . - 0-349-11776-4
IN THE WORDS OF NELSON MANDELA / EDITED BY JENNIFER CRWYS-WILLIAMS . - SANDTON : PENGUIN , 2004 . - 014027049-3
INK IN THE PORRIDGE [Monographs] / ARTHUR GOLDSTUCK. - LONDON : PENGUIN 1994. - 0-14-024659-2
LESSONS OF STRUGGLE [Monographs] / ANTHONY W. MARX. - CAPE TOWN : OXFORD UNIV. PRESS 1992. - FACTS AND FICTION. - 0-19-570728-1
LONG WALK TO FREEDOM / NELSON MANDELA. - LONDON. - 0-349-10653-3
LONG WALK TO FREEDOM : ABRIDGED / NELSON MANDELA ; ABRIDGED BY COCO CACHALIA AND MARC SUTTNER. - BRAMFONTEIN : NOLWAZI. 2000. - 1-919762-87-6
LOOSING THE BONDS [Monographs] : UNITED STATES & SOUTH AFRICA IN THE APARTHEID YEARS / ROBERT KINLOCH MASSIE. - NEW YORK : DOUBLEDAY. 1997. - 0-385-26167-5
MADIBA - NELSON ROLIHLAHLA MANDELA [Monographs] : - A CELEBRATION. - FIRST. - CAPE TOWN : MARTIN SCHNEIDER & CO & TWIDALE PUBL., 1997. - 0-620-21600-X
MADIBA MAGIC : NELSON MANDELA'S FAVOURITE STORIES FOR CHILDREN / EDITED BY LINDA RODE. - CAPE TOWN : TAFELBERG, 2003. - 0-624-04073-9
MADIBA-BOEK : NELSON MANDELA SE GUNSTELING-STORIES VIR KINDERS / REDAKTEUR DEUR LINDA RODE. - KAAPSTAD : TAFELBERG, 2002. - 0-624-04074-7
MANDELA, TAMBO AND THE ANC [Monographs] / S JOHN. R HUNT-DAVIS. - OXFORD : O.U.P.
MANDELA'S EARTH [Monographs] / WOLE SOYINKA. - LONDON : METHUEN. 1988. - 0-413-61610-X
NELSON MANDELA : EARLY LIFE OF ROLIHLAHLA MADIBA / JEAN GUILOINEAU . - CALIFORNIA : NORTH ATLANTIC , 2002 . - 1-55643-417-0
NELSON MANDELA : THE STRUGGLE IS MY LIFE. HIS SPEECHES AND WRITINGS 1944-1990. [Monographs] / NELSON MANDELA. - CAPE TOWN : MAYIBUYE/DAVID PHILIP. - FACTS AND FICTION. - 1-86808-21
NELSON MANDELA [Monographs] : THEY FOUGHT FOR FREEDOM / KARIN PAMPALLIS. - PARDW : HASKEW MILLER. 2000. - (THEY FOUGHT FOR FREEDOM). - 0-636-04329-0
NELSON MANDELA AND THE RISE OF THE ANC [Monographs]. - JOHANNESBURG : JONATHAN BALL
PART OF MY SOUL [Monographs] / WINNIE MANDELA. - LONDON : PENGUIN 1985. - 0-14-008483-5
RISE AND FALL OF APARTHEID : THE CHRONICLE OF A DIVIDED SOCIETY AS TOLD THROUGH SOUTH AFRICA'S NEWSPAPERS [Monographs] / PETER JOYCE. - CAPE TOWN : STRUIK 1990. - EXCLUSIVE. - 0-86
RIVONIA STORY [Monographs] / JOEL JOFFE. - BELLVILLE : MAYIBUYE. 1998. - 1-86808-275-X
ROBBEN ISLAND [CHART]. - THE STAR NEWSPAPER
SOUTH AFRICA : THE STRUGGLE FOR A BIRTHRIGHT [Monographs] / MARY BENSON. - LONDON : INT DEFENCE & AID FUND 1985. - FACTS AND FICTION. - 0-904759-67-9
SOUTH AFRICA 1990-1994 : THE MIRACLE OF A FREED NATION [Monographs]. - CAPE TOWN : DON NELSON. - 1868061051
SOUTH AFRICA YEARBOOK 1998 [Monographs]. - PRETORIA : GOVT COMMUNICATION & INFO SYSTEM. 1998. - 0-7970-3648-2
TOMORROW IS ANOTHER COUNTRY : THE INSIDE STORY OF SOUTH AFRICA'S NEGOTIATED REVOLUTION [Monographs] / ALLISTER SPARKS. - SANDTON : STRUIK 1995. - 1-875015-11-6
TRUE SURVIVAL STORIES [Monographs] / ANTHONY MASTERS. - UK : SIENA. 1997. - 0-75252-831-9
VANISHING CULTURES OF SOUTH AFRICA [Monographs] : CHANGING CUSTOMS IN A CHANGING WORLD / PETER NAGUBANE. - CAPE TOWN : STRIK. 1998. - 1-86825-967-6
VIVA MANDELA [VD] / CANON COLLINS EDUCATIONAL TRUST. - SOUTH AFRICA : WADHAH FILMS. - VHS VIDEO. COLOUR. APPRO 120 MINS
WINNIE MANDELA : LIFE / ANNE MARIE DU PREEZ BEZOMOS. - CAPE TOWN : ZEBRA. 2003. - 1-86872-662-2
Selected search items
ISBD
Shelf

A list of titles appears. Scroll down to the desired title. Double click on the title for more information such as Accession number, barcode, whether the item has been issued or not, the author and the subjects that the item includes. Right click on the title for a full bibliographic description.

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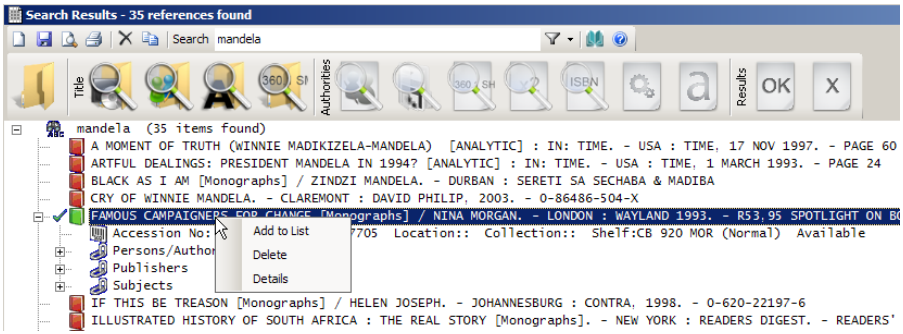
Search Results - 35 references found
Search
mandela
Title
Authorities
Results
OK
X
mandela (35 items found)
A MOMENT OF TRUTH (WINNIE MADIKIZELA-MANDELA) [ANALYTIC] : IN: TIME. - USA : TIME, 17 NOV 1997. - PAGE 60
ARTFUL DEALINGS: PRESIDENT MANDELA IN 1994? [ANALYTIC] : IN: TIME. - USA : TIME, 1 MARCH 1993. - PAGE 24
BLACK AS I AM [Monographs] / ZINDZI MANDELA. - DURBAN : SERETI SA SECHABA & MADIBA
CRY OF WINNIE MANDELA. - CLAREMONT : DAVID PHILIP, 2003. - 0-86486-504-X
FAMOUS CAMPAIGNERS FOR CHANGE [Monographs] / NINA MORGAN. - LONDON : WAYLAND 1993. - R53,95 SPOTLIGHT ON B
Accession No:
Location:: Collection:: Shelf:CB 920 MOR (Normal) Available
Persons/Author
Publishers
Subjects
Add to List
Delete
Details
IF THIS BE TREASON [Monographs] / HELEN JOSEPH. - JOHANNESBURG : CONTRA, 1998. - 0-620-22197-6
ILLUSTRATED HISTORY OF SOUTH AFRICA : THE REAL STORY [Monographs]. - NEW YORK : READERS DIGEST. - READERS'

Author
Click on Author button to

A list of authors appears. Scroll down to the desired author. Double click on it for a list of available titles by that author. Click on the title for more information. Right click on the relevant title for a full bibliographic description.

Please note that the icon on the left of the item is the icon selected by you for a certain type of item in BackOffice, Global Parameters, Publication Types. The number on the far right is the Dewey number for that item.

By clicking on the desired title, more information appears about the title such as Accession number, barcode, Front Office reflects whether the item is Available on the shelf or out on issue as well as the due date for a return. Clicking on Persons/Authors reveals the author of the item. Clicking on Subjects as in the following screen reveals the subjects included in the item:

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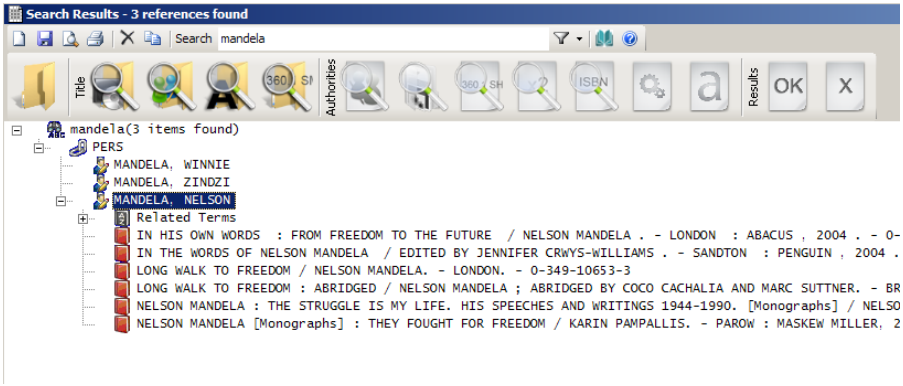
Search Results - 3 references found
Search mandela
Title
Authorities
Results
OK
X
mandela(3 items found)
PERS
MANDELA, WINNIE
MANDELA, ZINDZI
MANDELA, NELSON
Related Terms
IN HIS OWN WORDS : FROM FREEDOM TO THE FUTURE / NELSON MANDELA . - LONDON : ABACUS , 2004 . - 0-
IN THE WORDS OF NELSON MANDELA / EDITED BY JENNIFER CRWYS-WILLIAMS . - SANDTON : PENGUIN , 2004 .
LONG WALK TO FREEDOM / NELSON MANDELA. - LONDON. - 0-349-10653-3
LONG WALK TO FREEDOM : ABRIDGED / NELSON MANDELA ; ABRIDGED BY COCO CACHALIA AND MARC SUTTNER. - BR
NELSON MANDELA : THE STRUGGLE IS MY LIFE. HIS SPEECHES AND WRITINGS 1944-1990. [Monographs] / NELSO
NELSON MANDELA [Monographs] : THEY FOUGHT FOR FREEDOM / KARIN PAMPALLIS. - PAROW : MASKEW MILLER, 2

A full bibliographic description of the item appears by right clicking on the title as in the following screen:

Subject
Click on Subject button to make it bold. Type in your search terms and click Search at the bottom.

A list of subjects will appear. Click on the subject to get a list of items dealing with that subject. Click on the title for more information. Right click the title for a full bibliographic description. Examples of screens under Author section above.

Class searching
This will work if you have linked your Dewey numbers whilst cataloguing an item.

Selecting OPAC Search Results

The bottom section of the OPAC screen contains the selected OPAC search results. There are two ways of selecting items. The first is to right click an item and to select *Add to List.* The second is to drag and drop. The selected items are then placed in the selected list.

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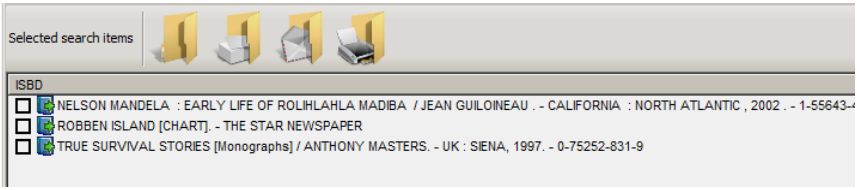
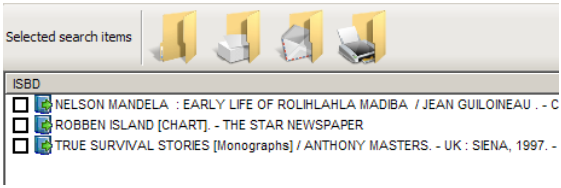

Selected search items
ISBD
NELSON MANDELA : EARLY LIFE OF ROLIHLAHLA MADIBA / JEAN GUILOINEAU . - CALIFORNIA : NORTH ATLANTIC , 2002 . - 1-55643-
ROBBEN ISLAND [CHART]. - THE STAR NEWSPAPER
TRUE SURVIVAL STORIES [Monographs] / ANTHONY MASTERS. - UK : SIENA, 1997. - 0-75252-831-9

Saving, Emailing or PrintingOPAC search results

There are four buttons that can be used for the selected list. The first is to clear the items. The second saves them to a Text document. The third eMails them and the fourth prints them.

All search results can be printed by clicking on the Print button at the bottom of the screen.


Selected search items
ISBD
NELSON MANDELA : EARLY LIFE OF ROLIHLAHLA MADIBA / JEAN GUILOINEAU . - C
ROBBEN ISLAND [CHART]. - THE STAR NEWSPAPER
TRUE SURVIVAL STORIES [Monographs] / ANTHONY MASTERS. - UK : SIENA, 1997. -

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Chapter 9

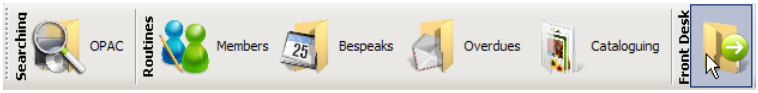
Front Desk

This module is designed for ease of use and speed. It offers the facilities for computerised issue of items.

The module is linked to the users that have access to the module.

Issuing Stock Items

As the parameters controls Front desk output, remember that stock items are issued according to Parameter settings. Therefore before starting to work with Front Desk, please ensure that you have set the dates correctly in Global Parameters; System Dates; Member Types and Publication Types. Please refer to instructions under Parameter Maintenance, System Dates in this manual. Open Front Office by clicking on the Front Desk picture button:



The Front Desk screen provides all the functionality that is neded to perform the following functions:

- Issuing Items
- Returning Items
- Renewing Items
- Bespeaks

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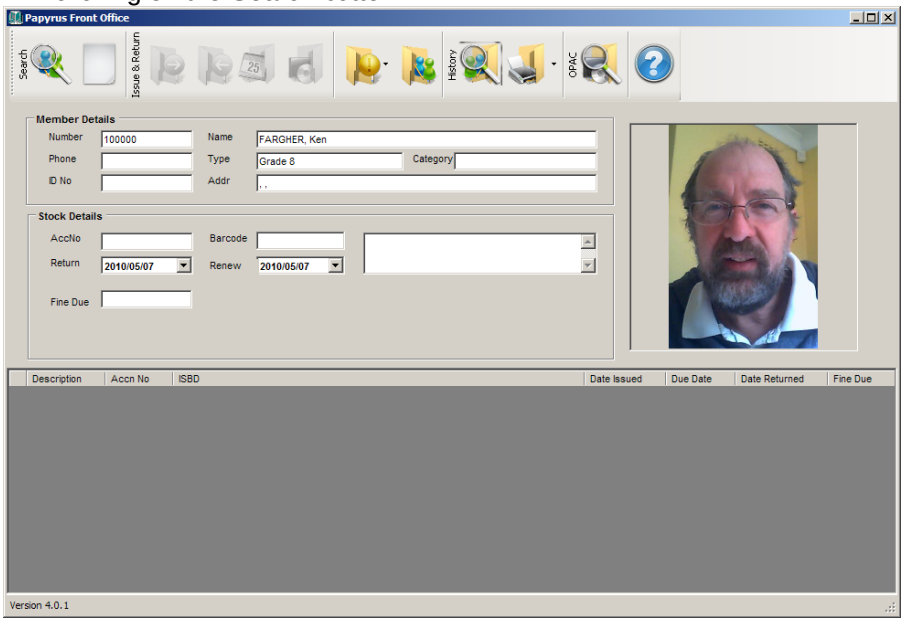
- Enquiring on Loan History
- OPAC Searching
- Fines an payment of Fines

Procedure for Issuing an Item

- In Member Number enter either the member number or barcode or ID Number (or scan using a barcode reader). The cursor will now be placed in the Accession Number. The member can also be found by clicking on the Search button.



- Enter the accession number or barcode number of item or scan the barcode on the item. The item's details are displayed together with the return date filled in. If the item has not been issued the **Issue** button will be highlighted.

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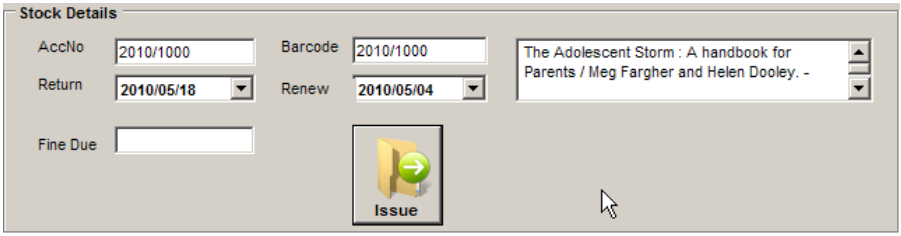


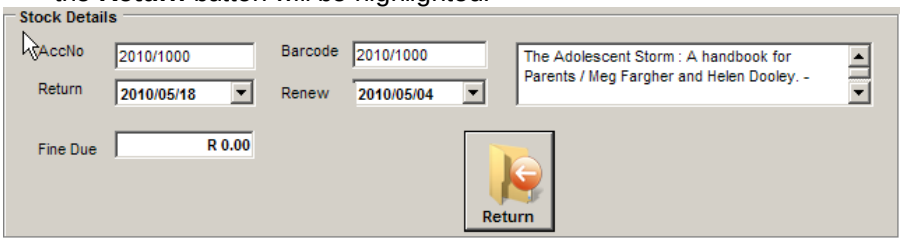
- Click on the Issue button. The item will be issued and the cursor will be ready at the next accession number.
- If the Member wishes to take out more than one item, either enter the accession number or scan the barcode of the item into the Stock/Accession number/barcode field and follow the Issue button instructions
- Note that when the item is issued, Papyrus tells you the return date at the bottom of the screen in the grid.

To restart the process with a new member, click on the Member Number, or click the New Button on the toolbar or press CTRL N for New.

Returning Stock Items

Follow these steps:

- You can either enter or scan the Member's Barcode, Member Number of ID Number or you can scan the accession number or barcode of the item that is being returned
- If the item has been issued the member's details will be displayed and the **Return** button will be highlighted.



- Click on the **Return** button
- Repeat this process for as many items that are being returned.

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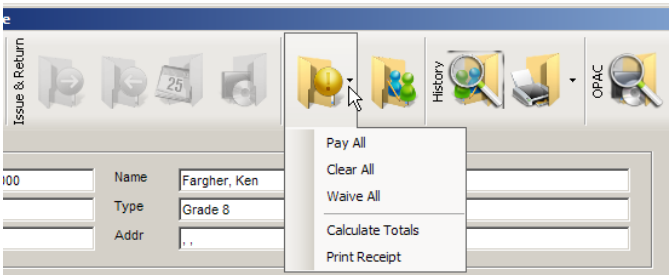
- To restart the process with a new member, click on the Member Number, or click the New Button on the toolbar or press CTRL N for New.

Items can be issued and returned at the same time. The corresponding ISSUES or RETURN button will be displayed.

The Return Date cn be changed if required.

Fines

If the member has fines these can beee managed with the Finesss drop down button.



The **OPAC** button is useful for OPAC searches whilst dealing with a member's records.

Once this is clicked the bottom screen changes to indicate all the items for which there are fines.

Pay All – will mark all the items fines to be paid.

Clear All – will un mark all the fines to be paid.

Waive All – will mark all the fines as waived.

Calculate Total – will show the total of the fines Due, less the fines to be waived giving the fines to be paid.

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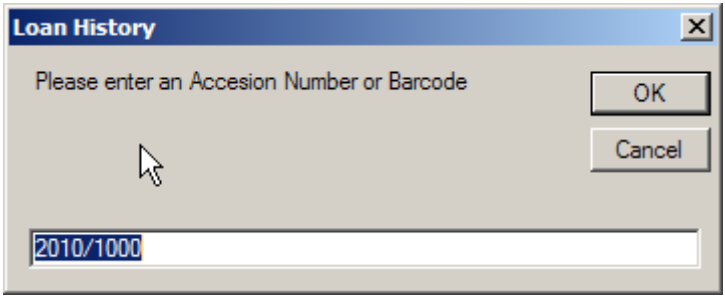
Print Receipt will produce a receipt of the fine to be paid.

Once this process is completed, all teh outstanding books are displayed in the grid.

Loan History

The History button will show the history of loans for a member. This can be printed out using the Print Members History button.

If the Print Item history is clicked, you will be prompted to enter or scan the item's barcode or accession number.



The corresponding item's history is printed.

OPAC Search

Whilst working on a Member's issues and returns, OPAC searches can be done.

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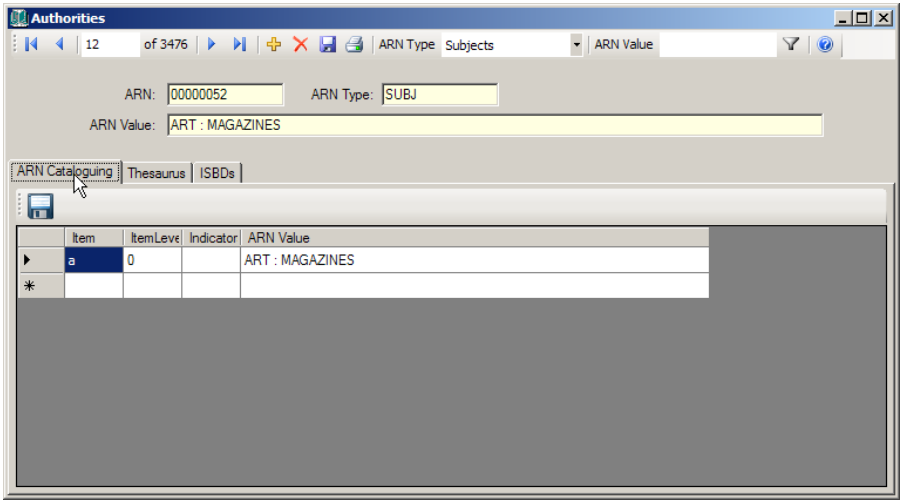
Chapter 10

Authorities

Click Cataloguing on the Menu Bar and select Authorities. This facility enables you to manipulate your Authorities files e.g.: changing spelling errors, adding new Authorities or deleting Authorities. The Authorities files are the ones to which you link fields for searching purposes whilst cataloguing.

The following screen appears:



To change, delete or add a new Authority

To change the cataloguing details of the ARN, change the ARN Value in the grid. If you delete an ARN, you will be warned that it will be removed from

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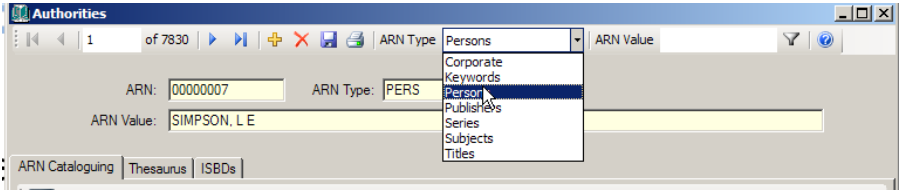
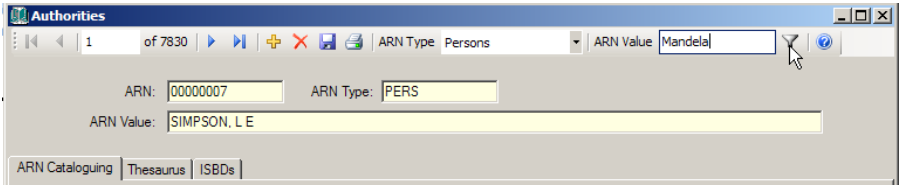
all BRNs that are cross referenced to it. To check which BRNs are linked, select the ISBDs tab. Then click the **Save** button to save the changes.

To filter the Authorities by type, select the drop down button with the authority type.



Toe search of an item, you can enter a few letters of the authority in the ARN Value search field. Then select the filter button.



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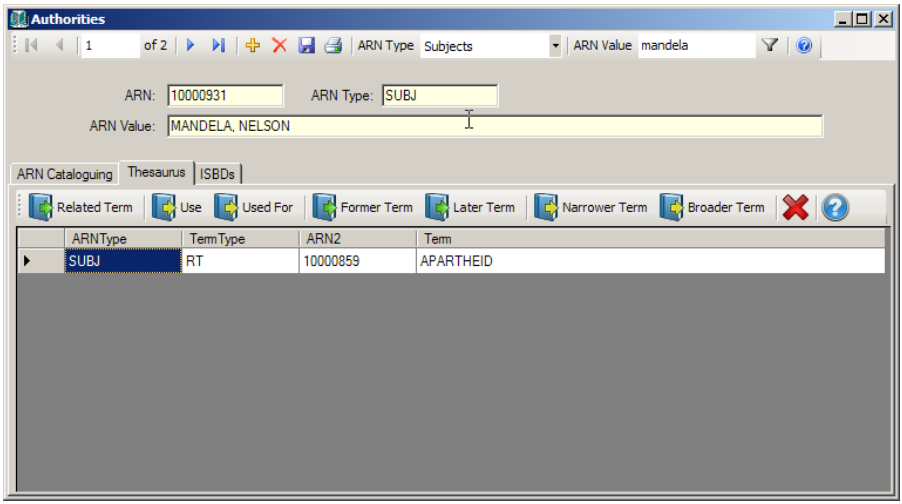
Chapter 11

Thesaurus

The Thesaurus enables you to add Related terms, stipulate Used terms, Broader and Narrower terms, Former (previously used such as South West Africa) terms and Latter (current such as Namibia) terms to Authority files.

In the Authorities screen, there is a Thesaurus Tab. Select an Authority and click the Thesaurus Tab. The following screen appears:



There are term types which are listed in the grid. These are abbreviated to:

RT is Related Term
US is Use
UF is Used For

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BT is Broader Term
NT is Narrower Term
FT is Former Term
LT is Latter Term

To insert a related term

Click one of the buttons on the tool bar.

This will open OPAC to search of a related Authority. Select it and this will create the related Thesaurus reference.

To delete a Thesaurus refernce, highlight the whole record and click the DELETE button on the tool bar.

Broader and Narrower terms

Following the above procedures but clicking on the BT or NT buttons can stipulate broader and narrower terms. Example: History Germany the BT is History Europe and vice versa.

Former and Latter terms

Former and Latter terms can be stipulated by following the above procedures but clicking on the FT or LT buttons. Example: South West Africa is the FT and Namibia is the LT.

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Chapter 12

Serials

Cataloguing a Serial

First you must catalogue the Serial using EasyCat.

Then click on the Serials TAB in EasyCat.

Serials will enable you to see

- when the subscription to the periodical commenced
- when the last periodical issue was received
- when the next periodical issue is due
- what the status of each issue is
- what the frequency is
- when it needs to be renewed
- when the last payment occurred
- the order date as well as a reference number

The following screen will appear:

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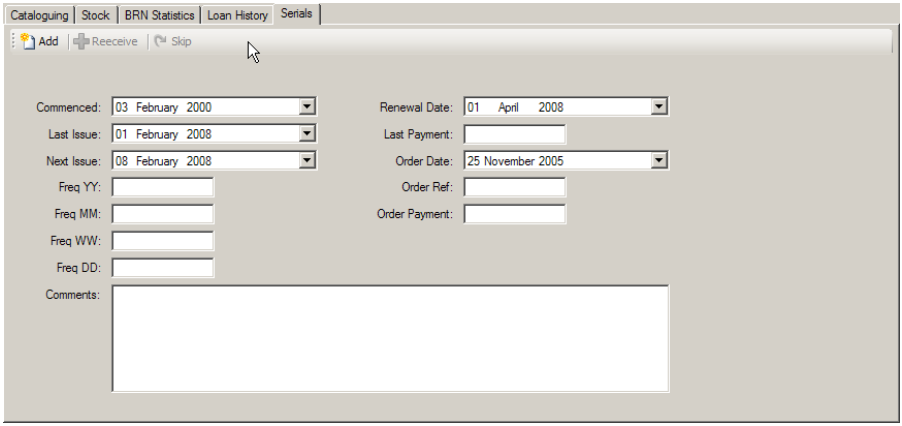

To add the Serial record, click the Add button on the toolbar.

Fill in the next issue's date into the Next Due field.
Fill in the frequency fields i.e. 01 in MM field for a monthly publication or 14 in the DD field for an issue that appears every 2 weeks.
Do not leave any of the frequency fields empty.
Type a 0 into the fields that are not appropriate to an issue.
Type in the renewal date as follows 2002/05/01 i.e. year, month day.
Type in the Last Payment amount without the rand sign
Type in the date the payment was made in Order Date
Type in the order reference number in Order Ref

Any notes may be typed into the Comments field

Skip button is clicked when an issue is skipped i.e. has not arrived. Later if it arrives, highlight the issue and click the Received button.

Received button is clicked whenever the next issue is received. Please note that the dates change in Last Received and Next Due fields. Papyrus automatically calculates when the next issue is due if the information in the Frequency field is correct. The issue is also added to the list at the bottom of the Stock Tab.

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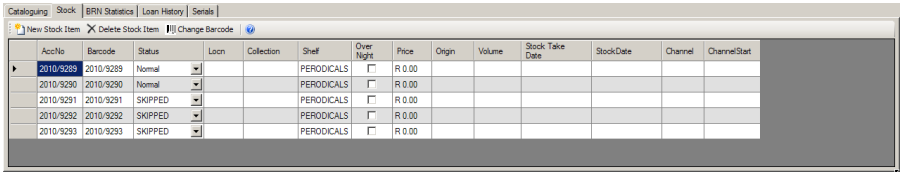

This is the information that appears in OPAC. For issue dates, volumes and numbers of issues to appear in OPAC, you must type in this information here.

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Chapter 13

Stock Take

Performing a Stock Take with Papyrus makes your job easy, quick and accurate. The process is involves the following steps:

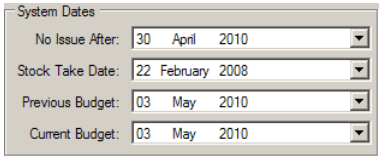
- Decide on a date in the future which will be the Stock Take Date. This is the date which all items that have been tracked are marked as having been found during the stock take. All items not found will have a date prior to this date.

- Decide on an area in the Library that will have a Stock Take. This would involve selecting a Location, a Collection and a rnage of shelves.

- Find all books and scan in their barcode. This will mark the item's *Stock Take Date* to that of the *Stock Take Date* in the System Dates.

- Print out a report of all items that are missing using the Location, Collection and Shelf Range. Repeat finding the missing books until the stock take is finished.

The first thing is to decide on the Stock Take Date. Select Parameters, System Dates from the Menu Bar. On the screen, there is a grouyp box with System Dates. Select the date using the following screen:


System Dates
No Issue After: 30 April 2010
Stock Take Date: 22 February 2008
Previous Budget: 03 May 2010
Current Budget: 03 May 2010

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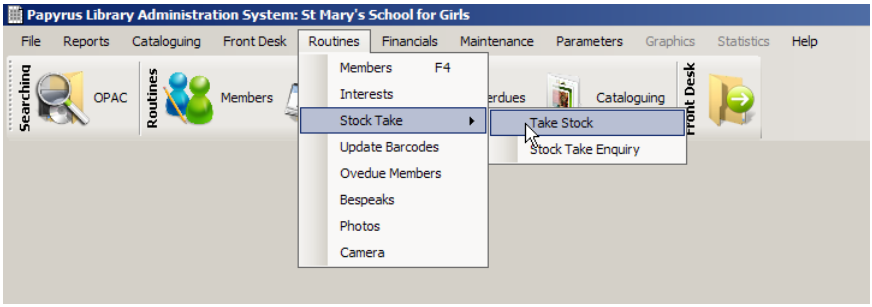
Now select the *Routines* menu option, then *Stock Take* option, and the *Take Stock* item.



In Stock Take Date field change the date on which Stock Take will **end**(the same date as you typed into Parameter Maintenance**)**.

Scan or manually enter the Barcode or Accession Number into the Barcode or Accession Number field.

The bibliographic description of the scanned item appears in the ISBD field

This will mark the item as having been ***Stock Taken***.

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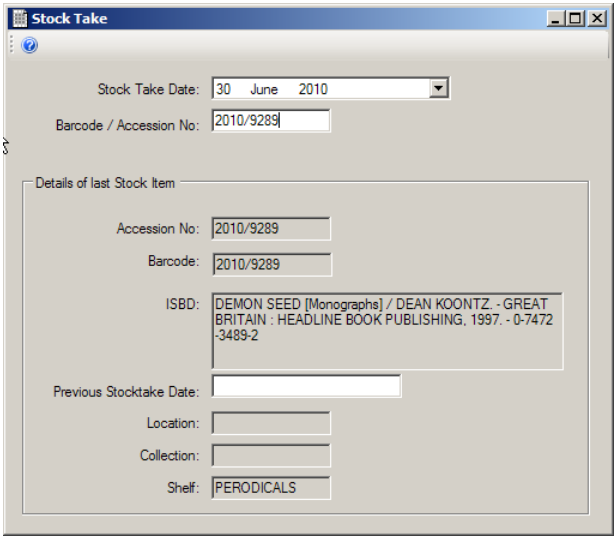

Continue with this scanning process until all the relevant items have been entered

If you do not finish your Stock Take in one day, just enter the same dates the next day as described above and continue scanning.

Using a barcode scanner makes stock taking quick because you just scan the item that then gets automatically sent to the Stock Reports. The stock take date is recorded when you scan your item.

The system will take into account items that have been issued and not returned. When you run the reports, the system will ask you to update the items in circulation. They will be taken stock of at the Stock Take date in the Systems dates (see below).

Checking the stock not found during Stock Take

At the end of Stock Taking, you will be able to enquire on the Stock Take. Select the Stock Take Enquiry option under the Routines, Stock menu option.

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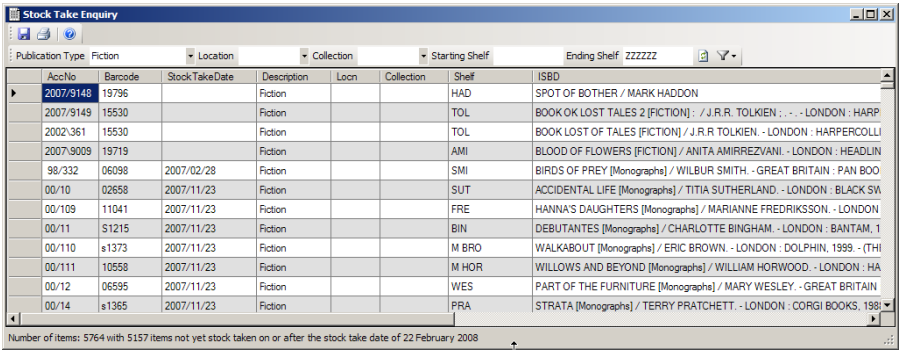
This screen will show you the stock date of the stock in the system. You can filter the items on Publication Type, Location, Collection and Shelf Range using a starting Shelf and an Ending Shelf. There is also a filter button that will select:

- All Stock Items – whether taken stock of or not
- Stock Taken Items – which have been scanned during the Stock Take
- Outstanding Items – those items that are missing


Stock Take Enquiry
Publication Type Fiction
Location
Collection
Starting Shelf
Ending Shelf ZZZZZZ
AccNo | Barcode | StockTakeDate | Description | Locn | Collection | Shelf | ISBD
2007/9148 | 19796 | | Fiction | | | HAD | SPOT OF BOTHER / MARK HADDON
2007/9149 | 15530 | | Fiction | | | TOL | BOOK OK LOST TALES 2 [FICTION] : / J.R.R. TOLKIEN ; . - . - LONDON : HARP
2002\361 | 15530 | | Fiction | | | TOL | BOOK LOST OF TALES [FICTION] / J.R.R TOLKIEN. - LONDON : HARPERCOLLI
2007\9009 | 19719 | | Fiction | | | AMI | BLOOD OF FLOWERS [FICTION] / ANITA AMIRREZVANI. - LONDON : HEADLIN
98/332 | 06098 | 2007/02/28 | Fiction | | | SMI | BIRDS OF PREY [Monographs] / WILBUR SMITH. - GREAT BRITAIN : PAN BOO
00/10 | 02658 | 2007/11/23 | Fiction | | | SUT | ACCIDENTAL LIFE [Monographs] / TITIA SUTHERLAND. - LONDON : BLACK SW
00/109 | 11041 | 2007/11/23 | Fiction | | | FRE | HANNA'S DAUGHTERS [Monographs] / MARIANNE FREDRIKSSON. - LONDON
00/11 | S1215 | 2007/11/23 | Fiction | | | BIN | DEBUTANTES [Monographs] / CHARLOTTE BINGHAM. - LONDON : BANTAM, 1
00/110 | s1373 | 2007/11/23 | Fiction | | | M BRO | WALKABOUT [Monographs] / ERIC BROWN. - LONDON : DOLPHIN, 1999. - (THI
00/111 | 10558 | 2007/11/23 | Fiction | | | M HOR | WILLOWS AND BEYOND [Monographs] / WILLIAM HORWOOD. - LONDON : HA
00/12 | 06595 | 2007/11/23 | Fiction | | | WES | PART OF THE FURNITURE [Monographs] / MARY WESLEY. - GREAT BRITAIN
00/14 | s1365 | 2007/11/23 | Fiction | | | PRA | STRATA [Monographs] / TERRY PRATCHETT. - LONDON : CORGI BOOKS, 198
Number of items: 5764 with 5157 items not yet stock taken on or after the stock take date of 22 February 2008

Reports can also be printed from the menu options under *Reports, Stock Reports, Stock Take Reports*.

The system will print all the items that were not scanned during stock take. If the date is old i.e. not during your current Stock Date, then you can assume that that item was missing during Stock Take. If there is any reason for an item not being found on the shelves eg: being lost, stolen, kept in the store room etc, it will tell you that the stock was lost, stolen, kept in store room etc. Papyrus will locate the status according to your Stock Status settings.

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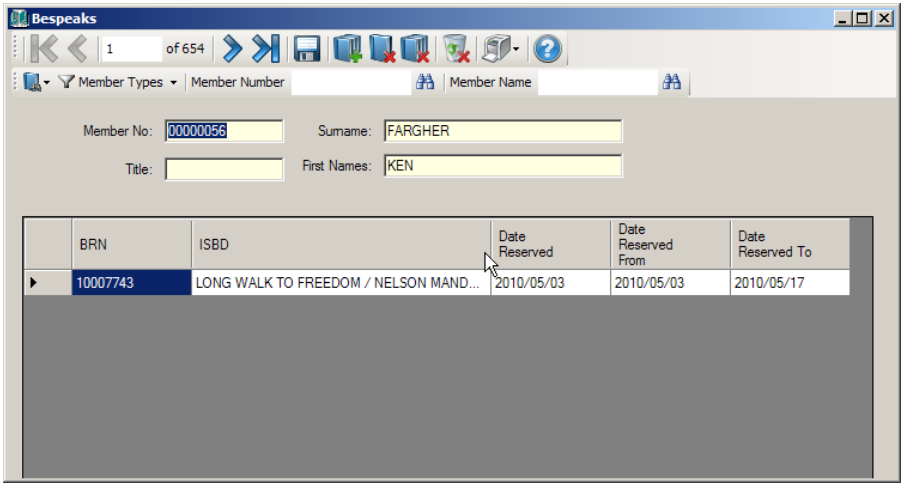
Chapter 14

Bespeaks

This section provides the facility whereby members can reserve certain items that are not currently available but do exist in the collection.

Click on Bespeaks button on the Tool Bar. Bespeaks is also available in Front Office/ Issues and Returns.

The following screen appears:



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Search for the member by entering their member number or member name or browse through the members by selecting the member type from the drop down button. The members that have items bespoken can be selected using the option Members with Bespeaks on the tool bar.

The relevant information appears giving the Member number, name of Member, BRN number, Bibliographic description and the dates for the period that the item is reserved for the Member.

A Bespeak may be deleted by highlighting the relevant row by clicking on the extreme left of the row (where the pencil appears in the illustration) and pressing the delete key. Any changes must be saved with the SAVE button.

The options on the Bespeak Toolbar include:

Adding and Deleting BRNs

Add New Items – to add BRN items to a member

Deleted selected Item – to remove the bespeak for a member

Delete All Items Bespoken for this Member – removes all bespoken items

Remove Bespeaks more than a Month Old – removes all bespoken items for all members that have been reserved for more than a month ago.

The print button prints a list of bespeaks for the selected Member or for all Bespeaks.

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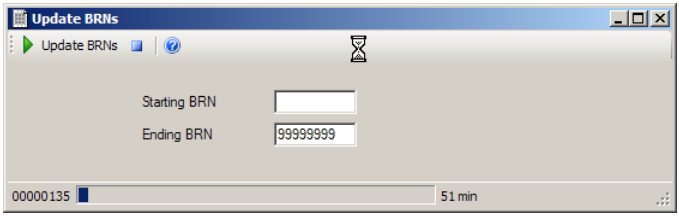
Chapter 15

Maintenance Tools

Master and secondary BRN (individual items such as books) and ARN (items in the Authority files eg: subjects, that are searchable) numbers can be consolidated and updated under Maintenance Tools.

Updating BRNs

Click on Maintenance Menu option on the tool bar and select Update BRNs. The following screen appears.



Click the Update BRNs button. This will ensure that all BRNs are correctly sorted, indexed and that the ISBD is properly formed.

Updating ARNs

The Authorities can also be processed using the Update ARNs options under the Maintenance Menu.

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Consolidate BRNs or ARNs

This facility is used to merge BRNs or ARNs that have been repeated or are similar

BRNs are individual items such as books or charts

ARNs are items in Authority Files that are searchable such as subjects and authors

Click on the relevant Consolidate BRN's or Consolidate ARN's buttons

The example deals with the BRN screen but the same process id followed if you choose the ARN option. The following screen appears:

Click on the top Master BRN Find button. This takes you into OPAC. Find the relevant BRN that you wish to retain as your Master entry. Click on the Secondary BRN Find button. This takes you to OPAC.

Find the BRN that is the same or similar to the one that you chose as the Master entry

Click the Merge button (this will combine the secondary BRN with the Master BRN. The Master BRN will remain in the file and the Secondary BRN will disappear as a separate entity). Click OK if you want the merge to happen

By clicking on the **Find button** at the bottom, Papyrus will automatically find any two similar BRN's for you to merge.

By clicking on the **Next button** at the bottom, Papyrus will automatically search for a BRN that is a duplicate of the Master BRN chosen by you. The following screen is an example (Please note that it picks up any duplicate whether text or symbolic as below):

Update Stock Codes

Papyrus will also check the database according to a range of shelves. The Shelf code is usually populated with the Dewey number together

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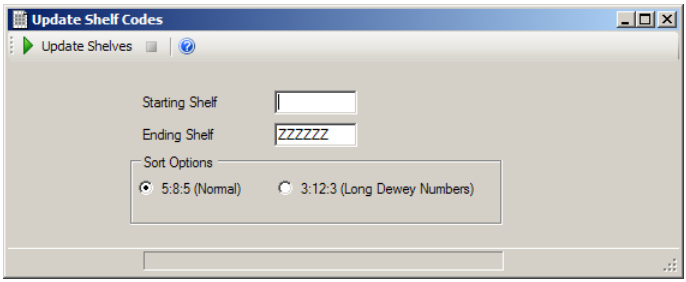
with the Author's Surname. Because of variations in the prefix and suffix that can be added to the shelf, sorting on this field becomes difficult. Even if the Dewey system is not used, the shelf code needs to be correctly sorted.

Papyrus sorts the shelf internally into three fields. A Prefix, the Dewey Shelf Code and the Suffix. The shelf code can 20 digits long and the shelf can be sorted according to two rules:

5:8:5 – the Prefix is 5 long, the Dewey code is 8 and the Suffix is 5

3:12:3 – The prefix is 3 long, the Dewey code can be 12 and the suffix 3



Typical combinations of the Shelf Code are sorted in the following manner:

SHELF	PREFIX	DEWEY CODE	SUFFIX
SMI			SMI
820.556 SMI		820.556	SMI
REF 820.556 SMI	REF	820.556	SMI
A SMI	A		SMI
A 820.556	A	820.556	

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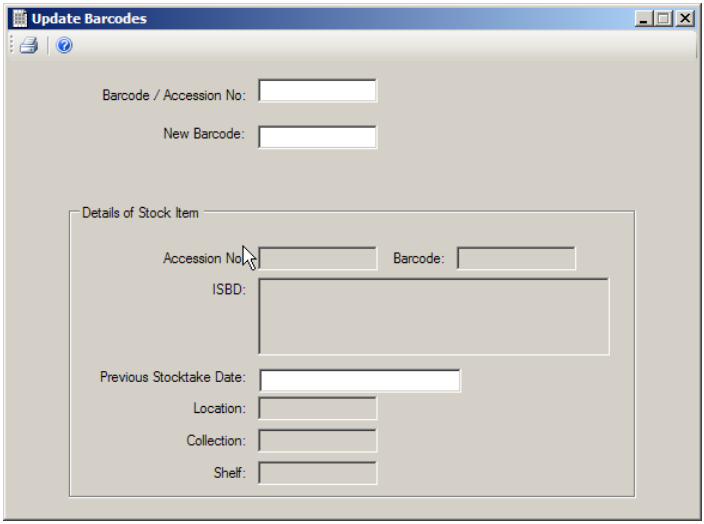
Export or Import BRN's

This facility allows for the export or import of data from other systems

Update Stock Barcodes

This facility allows for fast updating or changing of barcodes or Accession numbers on individual items. Click on Routines, Update Barcodes



Scan in the barcode or type in the Accession number for an item to appear. To change an items barcode, scan in the old barcode and then scan in the new barcode

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Chapter 16

Management Reports

The Papyrus library system has an extensive report writer section, which will be able to give you various management reports. With the report printed on your screen, you can decide what to do with it, whether to print it to the printer; save it to disk; email it, etc.

The accomplish this, follow the steps below:
1. Print any report to the screen
2. Click the Save icon with the Disk
3. You will be given the option of Excel or PDF.

The procedure and options for printing all reports are described under Bibliographical Reports. General instructions on how to use Management reports are under Member Reports.

Member Reports

Library Member reports are available in alphabetical, numerical, Member types and according to barcodes.

By Alpha will be used as an example.

Click on By Alpha :

By clicking on the relevant letter of the alphabet on the left Preview column as a starting point, the Report will generate a list of Library Members in alphabetical order as shown on this screen:

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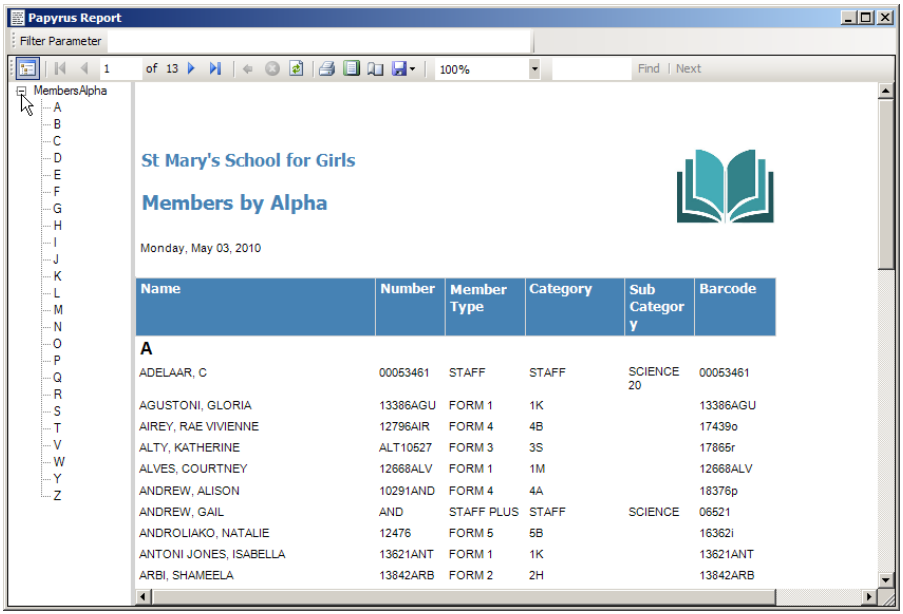

By Numeric generates reports of members according to their member number
By Type generates reports of members according to their Type as set up by you in BackOffice
Barcodes by Type/Category generates Member reports with member's barcodes

The following buttons appear on all Management Report screens:

The buttons at the top:

Hold the mouse over the various keys and an explanation will appear.
Print enables you to print the list
Save icon enables you to export the report to an Excel of PDF format.

Show or Hide Document Map fills the screen i.e. it hides the Preview feature. Click the icon again to bring back the Preview feature on the left hand side.
Zoom facility in percentages

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Various arrows with which to move from page to page
Search Text enables you to type in a keyword for searching egg: search for a particular member by typing in the surname. You have to be in the member reports to search for information about Members.

Bibliographic Reports

Bibliographical reports are available in alphabetical, numerical and by stock type/alpha. An ARN summary and detailed reports are also available.

See Member Reports section for further explanations of the general process and the facilities offered by the various buttons on the screens

On version 4.0, we have made the generation of reports much simpler. The change that has been applied on the new version is the way the reports appear on the screen. The new version gives you a preview of alphabets on the left and the list of your stock in alphabetical order. When wanting to look at a particular section, you just click the alphabet on the left and get the list of stock by the chosen alphabet without typing any criteria.

Issues and Returns

The following reports on Issues and Returns of stock are available:

- Stock on issue by member
- Stock on issue by accession number
- Stock on issue stock type
- Stock on issue that is overdue
- Stock on issue that is overdue by category
- Items on Bespeak
- List of fines
- Possession reports by Member Types

See Member Reports section for further explanations of the general process and the facilities offered by the various buttons on the screens

Stock Reports

The following stock reports are available:

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- List of stock by accession number
- List of stock by shelf
- List of stock by last scan date
- List of stock not scanned by last scan date
- Spine labels by stock date
- List of stock by stock status
- Overnight stock
- Stock by location/collection
- Deleted stock audit trail

See Member Reports section for further explanations of the general process and the facilities offered by the various buttons on the screens

Deleted stock report

Stock that is deleted is sent to the Deleted Stock Audit Trail reports. You can find information about deleted stock in this report e.g.: who lost the item.

Change the date at the top of the screen for information about items lost on days other than the current one

Authority Reports

Click on Management Reports, Authority reports and the following screen appears displaying the various reports that can be generated regarding Authorities:

See Member Reports section for further explanations of the general process and the facilities offered by the various buttons on the screens

Issues and Returns

Click on management reports, Issues and returns and the following screen appears displaying all the reports that can be generated regarding issues and returns:

See Member Reports section for further explanations of the general process and the facilities offered by the various buttons on the screens

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Statistics Reports

Click on Management Reports, Statistics Reports and the following screen appears displaying the various reports that can be generated regarding statistics:

See Member Reports section for further explanations of the general process and the facilities offered by the various buttons on the screens

If the figures are too small for you on the screen, clicking on the percentage button at the top can increase the size

Please note that the number in the second column after the year, indicates the month – in the screen below it is the column starting with 6

Graphic Reports

Click on Management reports, graphic Reports and the following screen will appear displaying the various reports that can be generated graphically i.e. as a graph:

See Member Reports section for further explanations of the general process and the facilities offered by the various buttons on the screens

Financial Reports

Click on Management Reports, Financial Reports and the following screen will appear displaying the various types of reports that can be generated regarding Finances such as purchases:

See Member Reports section for further explanations of the general process and the facilities offered by the various buttons on the screens

Printing Spine Labels

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Spine labels can be printed. There is a selection of Spine Label sizes. A barcode is also printed. Spine Labels can be printed for those items catalogued today, last week, last 100 and all stock items.

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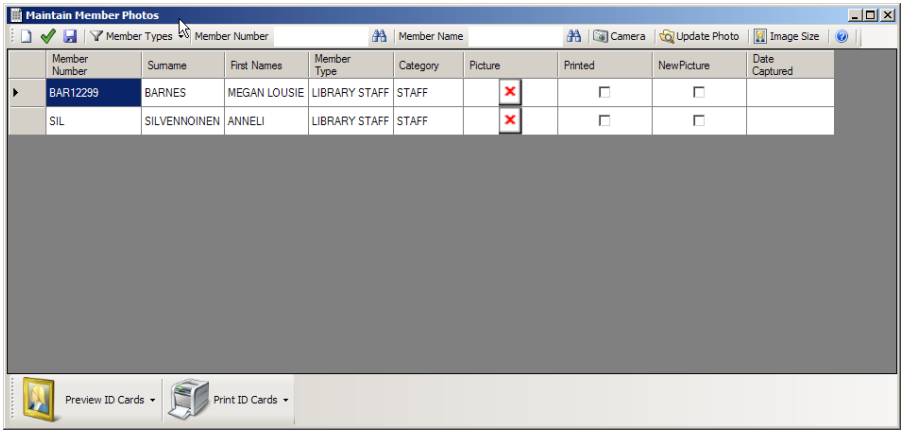
Chapter 17

ID Photos

This is a vast improvement because of new technology available on PCs and Notebooks. A video camera is required for this facility to work. Most will work such as a Logitec video camera. Parity Software will be able to supply you one that is compatible with Papyrus.

Click on Routines, Photos



Select the member by entering their barcode or a range of members by selecting their name or member type.

Taking Pictures

Then click the Camera Button on the tool bar. This will open the Camera screen so that a photo can be taken.

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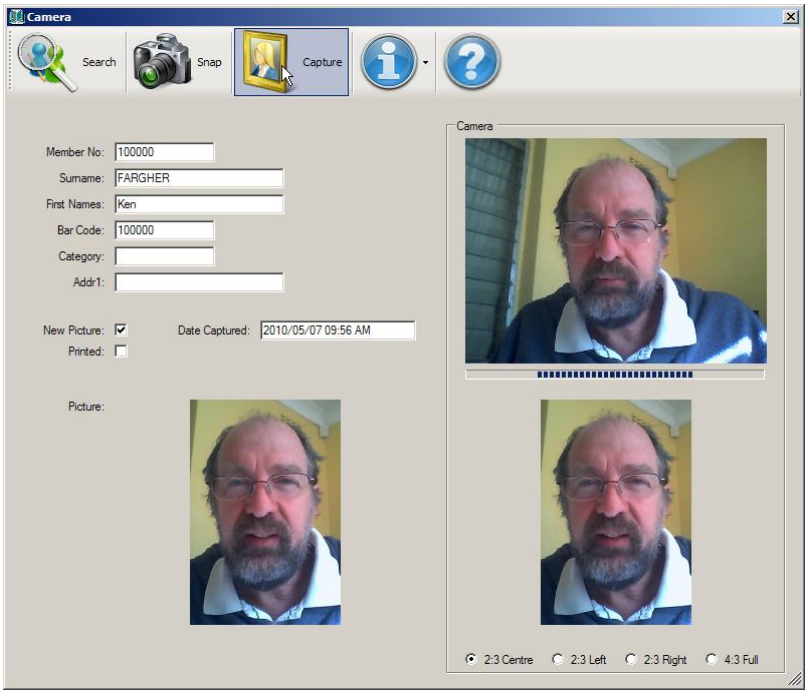
Click the SNAP button to grab a picture. This will be formatted based on the options of 2:3 Centre, 2:3 Left, 2:3 Right, 4:3 Full. These refer to the ration of width to height. If 2:3 ratios are selected, the picture will be cropped to a portrait format. If the 4:3 ratio is select, photos will be rotated on the ID card.



If the snapped photo looks fine, click the Capture button to add it to the Member.

Once the photo has been taken, close the screen and return the Photo screen. You will notice that the picture column now has the photo, the *New Picture* will be checked and the *Printed* will be unchecked.

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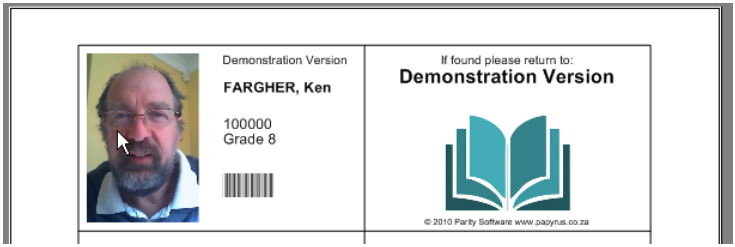
Printing ID Cards

Once you have completed the capturing of the picture, return to the previous screen to print the ID Card.

There are options to preview the ID Cards on the screen for all the ID cards, or just the New Picture ones or a specific Member by selecting the *Preview ID Cards* option at the bottom of the screen. You can also print the ID card immediately by selecting the *Print ID Cards* option.



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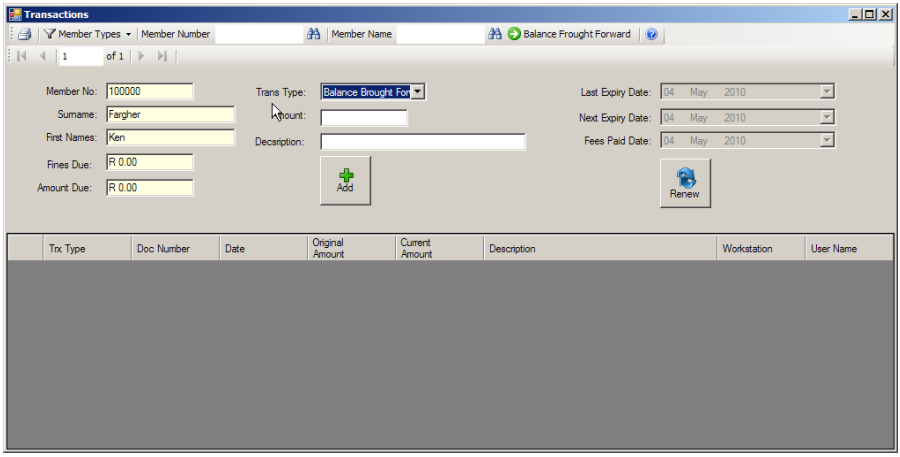
Chapter 18

Financial

All financial transactions in Papyrus are recorded against each member. The transactions can be view in the Financials, Transactions menu bar.



Fines

When a stock item is returned and there is a fine due, the fine is added to the member's account. The transaction type is FINE, there is a document number, a date and the original amount is set to the fine amount. The description will be the stock item and the Workstation and User will be recorded.

When the fine is paid, two transactions will be recorded. The CASH of the amount paid and the waived amount recorded ina WAIV transaction.

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Transactions

Transactions can be added to the members account by selecting the Trans Type, the *Description* and the *Amount*. Click the *Add* button to add the transaction onto the account.

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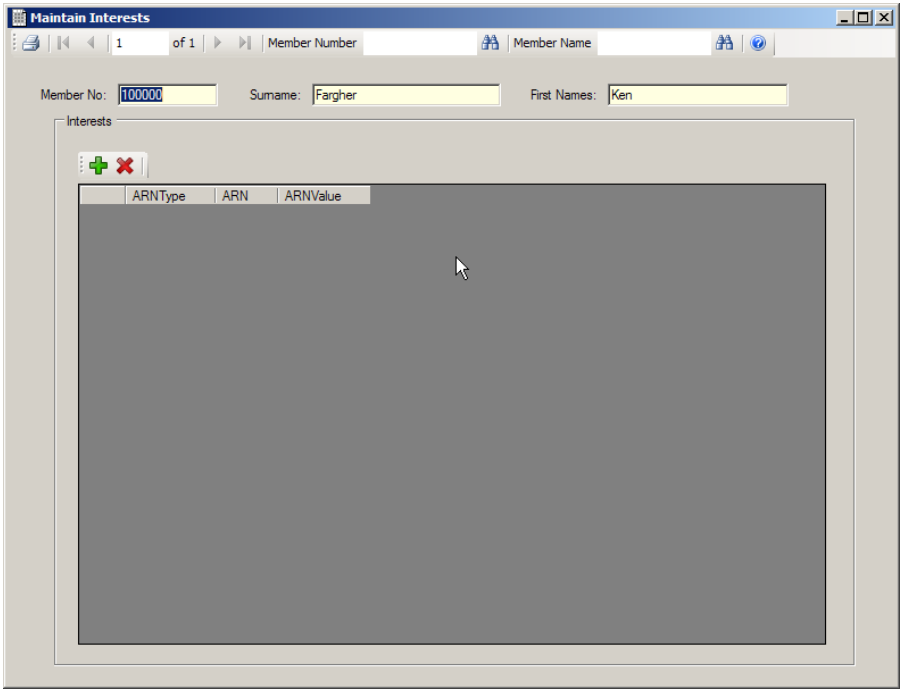
Chapter 19

Interests

This is a Current Awareness facility. If library members are interested in specific authorities such as subjects and authors, the system can notify users of the latest BRNs that have been catalogued in the library that have been cross referenced to these subjects.

Click on Routines, Interest. The following screen appears:



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First search for the member. Once the member has been found, the current interests linked to the member will be displayed.

Adding and Deleting Interests

To add or delete interests click the corresponding add and delete buttons on the tool strip.

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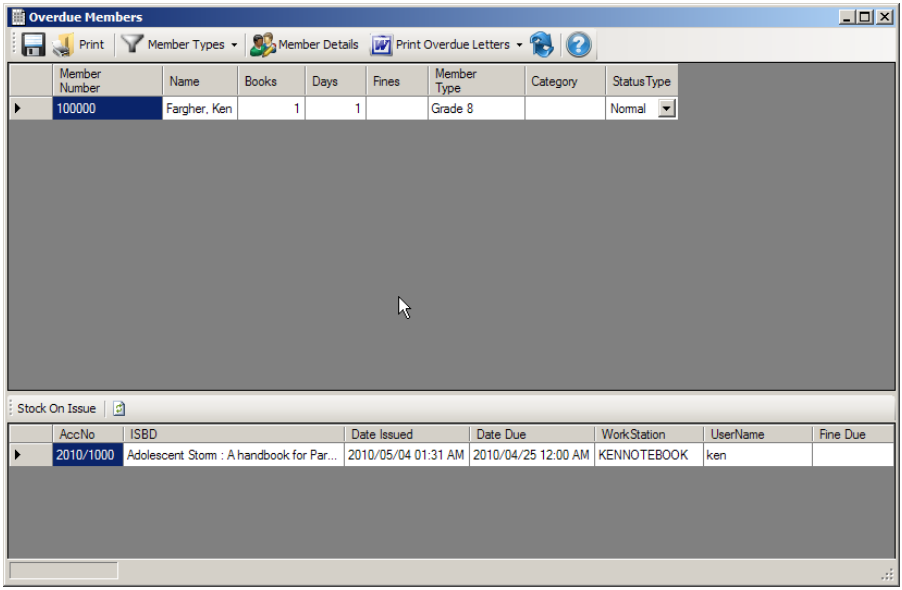
Chapter 20

Overdues

Papyrus provides excellent management of overdue items and members. Click the Overdues Button on the Main Screen. The following will appear:



All the members that are overdue will be displayed in the top grid. For each Member selected in the top grid, their overdue items will be displayed in the bottom grid.

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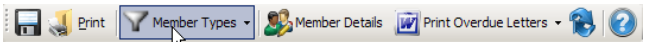
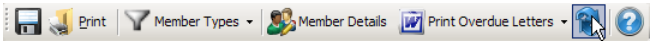
Members can be searched and filtered by using the Member Types button.



The fines can be recalculated at today's date by clicking the Recalculate All Fines for Members. Based on the member's selected, the fines will be recalculated based on the Privileges set up on the Parameters.

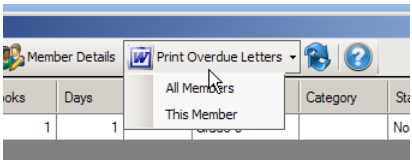


Overdue Reports

Click the Print button to produce a report of the overdue Members.

Overdue Letters

Click the Overdue Letters button giving an option for all members of the selected type or the Specific Member.



This will take the Microsoft Word Template from the Papyrus Template Directory and produce a letter showing the items that a Member has on loan and the items that are overdue. This letter can be changes to have the Organisation's Logo, fonts etc. Make a copy of the original file and do not change the body of the letter where Papyrus fills in the details. However, the Header and the Footer of the document can be changed.

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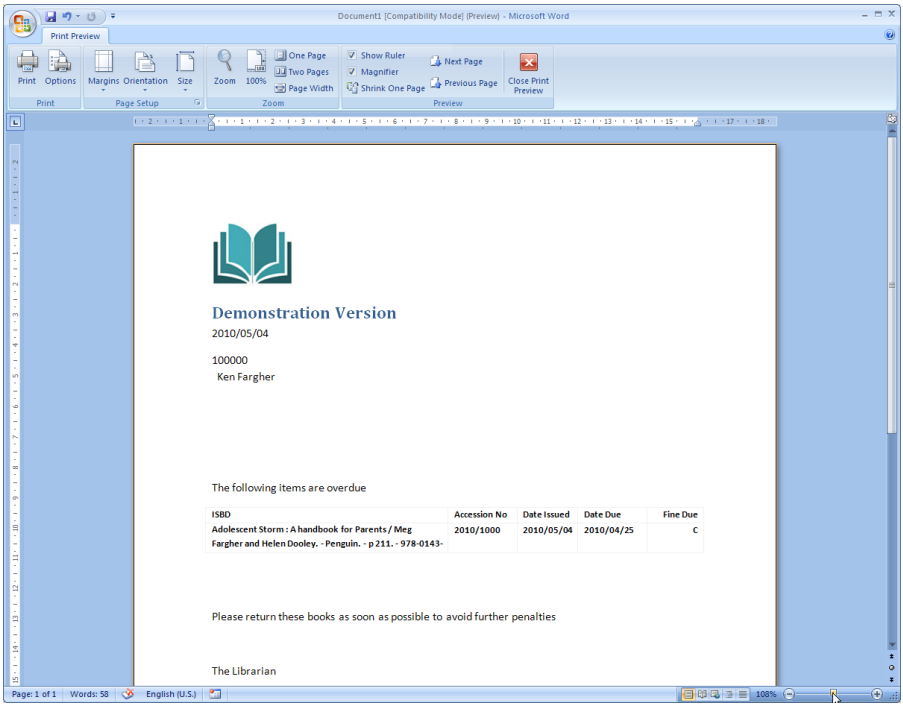

This can be emailed or printed if required.

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